Form **8868** 

(Rev. January 2024)

### Application for Extension of Time To File an Exempt Organization Return or Excise Taxes Related to Employee Benefit Plans

Department of the Treasury

File a separate application for each return.

OMB No. 1545-0047

Go to www.irs.gov/Form8868 for the latest information. Internal Revenue Service Electronic filing (e-file). You can electronically file Form 8868 to request up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits. Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Part I - Identification Name of exempt organization, employer, or other filer, see instructions. Taxpayer identification number (TIN) Type or NORTH CAROLINA SUSTAINABLE ENERGY **Print** 58-1342588 ASSOCIATION File by the Number, street, and room or suite no. If a P.O. box, see instructions. due date for filina vour 4800 SIX FORKS RD, 300 return. See instructions. City, town or post office, state, and ZIP code. For a foreign address, see instructions. 27609 RALEIGH, NC Enter the Return Code for the return that this application is for (file a separate application for each return) 01 Application Is For Return | Application Is For Return Code Code Form 990 or Form 990-EZ 01 Form 4720 (other than individual) 09 Form 4720 (individual) 03 Form 5227 10 Form 990-PF 04 Form 6069 11 Form 990-T (sec. 401(a) or 408(a) trust) 12 05 Form 8870 Form 990-T (trust other than above) 06 Form 5330 (individual) 13 07 Form 5330 (other than individual) 14 Form 990-T (corporation) Form 1041-A 80 After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330. • If this application is for an extension of time to file Form 5330, you must enter the following information. Plan Name Plan Number Plan Year Ending (MM/DD/YYYY) Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions) The books are in the care of MATT ABELE 4800 SIX FORKS RD, SUITE 300 - RALEIGH, NC 27609 Telephone No. 919-832-7601 Fax No. If the organization does not have an office or place of business in the United States, check this box If this is for a Group Return, enter the organization's four-digit Group Exemption Number (GEN) . If this is for the whole group, check this . If it is for part of the group, check this box ..... and attach a list with the names and TINs of all members the extension is for. I request an automatic 6-month extension of time until MAY 15 , 20 **25** , to file the exempt organization return for the organization named above. The extension is for the organization's return for: calendar year 20 JUL 1 , 20 23\_\_\_ , and ending \_\_\_\_ X tax year beginning JUN 30 . If the tax year entered in line 1 is for less than 12 months, check reason: Initial return Final return Change in accounting period 3a If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. За If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. 3h Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. Зс

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form 8868 (Rev. 1-2024)

\*\* PUBLIC DISCLOSURE COPY \*\*

### **Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public.

OMB No. 1545-0047

Department of the Treasury

Go to www.irs.gov/Form990 for instructions and the latest information.

		$\approx$ 2023 calendar year, or tax year beginning JUL 1, 2023 and ending	JUN 30, 2024	mopeonem
				M
	heck if pplicabl	C Name of organization	D Employer identific	cation number
	¬Addre	NORTH CAROLINA SUSTAINABLE ENERGY		
	_chang _Name	ASSOCIATION		
	chang	Doing business as	58-13425	88
	Initial return	Number and street (or P.O. box if mail is not delivered to street address) Room/su		
	]Final return		919-832-	
	termin ated	City or town, state or province, country, and ZIP or foreign postal code	<b>G</b> Gross receipts \$	2,297,499.
	Amen	RALEIGH, NC 27609	H(a) Is this a group re	eturn
	Application	F Name and address of principal officer: MATT ABELE	for subordinates	? Yes X No
	pendir	SAME AS C ABOVE	H(b) Are all subordinates in	
T	ax-ex	empt status: X 501(c)(3) 501(c) ( ) (insert no.) 4947(a)(1) or		list. See instructions
	Vebsi		H(c) Group exemptio	
				■ State of legal domicile; NC
	rt I	Summary	our or formation, = 2 / 0   N	otato or logar dormono; = 1 •
		Briefly describe the organization's mission or most significant activities: WE ENVIS	TON A FIITIRE V	WHERE NORTH
မွ		CAROLINA'S CLEAN ENERGY ECONOMY LEADS THE NAT		
au				
ern		Check this box if the organization discontinued its operations or disposed of m	_	1
Š		Number of voting members of the governing body (Part VI, line 1a)		$\begin{array}{ c c c c }\hline & 14\\\hline & 14\\\hline \end{array}$
æ		Number of independent voting members of the governing body (Part VI, line 1b)		
es		Total number of individuals employed in calendar year 2023 (Part V, line 2a)		24
iż		Total number of volunteers (estimate if necessary)		0
Activities & Governance	7 a	Total unrelated business revenue from Part VIII, column (C), line 12		0.
_	b	Net unrelated business taxable income from Form 990-T, Part I, line 11		0.
			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	2,109,899.	2,014,537.
	9	Program service revenue (Part VIII, line 2g)	362,444.	168,958.
eve	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	11,167.	18,436.
~	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	1,648.	95,260.
		Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	2,485,158.	2,297,191.
	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
		Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries other compensation, employee benefits (Part IX, column (A), lines 5:10)	1,889,627.	1,229,823.
Expenses	16a	Professional fundraising fees (Part IX, column (A), line 11e)  Total fundraising expenses (Part IX, column (D), line 25)  47,736.	0.	0.
ber	b	Total fundraising expenses (Part IX, column (D), line 25) 47, 736.		
Ä		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,300,487.	918,125.
		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	3,190,114.	2,147,948.
		Revenue less expenses. Subtract line 18 from line 12	-704,956.	149,243.
- S		Thevenue less expenses. Oubtract line to norm line 12	Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total accets (Port V. line 16)	2,076,362.	1,972,639.
sse Bala	20	Total assets (Part X, line 16)	607,139.	354,173.
let ∕ Ind	21	Total liabilities (Part X, line 26)	1,469,223.	1,618,466.
Do	rt II	Net assets or fund balances. Subtract line 21 from line 20	1,409,223.	1,010,400.
				. Imperculation and halief it is
	•	Ities of perjury, I declare that I have examined this return, including accompanying schedules and stat		knowledge and belief, it is
true,	correc	t, and complete. Declaration of preparer (other than officer) is based on all information of which prepare	arer nas any knowledge.	
		Signature of officer ——Signed by:	l Date	
Sigr			Date	
Here	е	MATT ABELE, EXECUTIVE DIRECTOR Matt Mule		
		Type or print name and title 6B85CC43E8C0444	Thu. The	
		Print/Type preparer's name Preparer's signature	Date Check Check	PTIN
Paid		ALEX LEHMANN ALEX LEHMANN	11/07/24 self-employ	
Prep	arer	Firm's name MPCOMPANY LLP	Firm's EIN 5	6-1945391
Use	Only	Firm's address 4600 MARRIOTT DRIVE SUITE 300		
_		RALEIGH, NC 27612	Phone no. 91	9-836-9200
May	the II	RS discuss this return with the preparer shown above? See instructions		X Yes No
_	_			

NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION 58-1342588 Page **2** Part III Statement of Program Service Accomplishments Check if Schedule O contains a response or note to any line in this Part III Briefly describe the organization's mission: NCSEA IS A 501(C)(3) NONPROFIT MEMBERSHIP ORGANIZATION WHOSE MISSION IS TO DRIVE POLICY AND MARKET DEVELOPMENT TO CREATE CLEAN ENERGY JOBS, ECONOMIC OPPORTUNITIES, AND AFFORDABLE ENERGY THAT BENEFITS ALL OF NORTH CAROLINA. Did the organization undertake any significant program services during the year which were not listed on the Yes X No prior Form 990 or 990-EZ? If "Yes," describe these new services on Schedule O. Yes X No Did the organization cease conducting, or make significant changes in how it conducts, any program services? If "Yes," describe these changes on Schedule O. Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported. \_\_\_\_\_ ) (Expenses \$ 1,196,280. including grants of \$ ) (Revenue \$ CONDUCT PUBLIC POLICY ADVOCACY INCLUDING MARKET AND POLICY RESEARCH ANALYSIS, FACILITATION OF STAKEHOLDER DIALOGUE AND PROBLEM SOLVING, AND PARTICIPATING IN REGULATORY AND POLICY DECISION-MAKING PROCESSES AS RELATES TO SUSTAINABLE PLANNING, PROVISION AND USE OF ENERGY. 170,897. including grants of \$ ) (Expenses \$ ) (Revenue \$ DEVELOP AND TEST MARKET-BASED, DATA DRIVEN SOLUTIONS FOR UTILITIES, CONSUMERS, AND CLEAN ENERGY PROVIDERS TO IMPROVE THE AFFORDABILITY, ACCESSIBILITY, AND RESILIENCE OF BOTH INDIVIDUAL CLEAN ENERGY SOLUTIONS AND ELECTRICITY SYSTEM AND SERVICES PROVIDED ACROSS THE SYSTEM. 341,794 including grants of \$ ) (Revenue \$ PROVIDE EDUCATION ON CLEAN ENERGY THROUGH RESEARCH, ONLINE CONTENT, PUBLICATIONS, CONFERENCES, WORKING GROUPS, AND WORKSHOPS.

Form **990** (2023)

Other program services (Describe on Schedule O.)

Total program service expenses

including grants of \$

1,708,971.

) (Revenue \$

Form 990 (2023) ASSOCIATION
Part IV Checklist of Required Schedules 58-1342588 Page 3

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?			
	If "Yes," complete Schedule A	1_	Х	
2	Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	2	Х	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for			
	public office? If "Yes," complete Schedule C, Part I	3		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect			
	during the tax year? If "Yes," complete Schedule C, Part II	4	Х	
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or			l
	similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to			l
	provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			l
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete			l
	Schedule D, Part III	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for			
	amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?			l
	If "Yes," complete Schedule D, Part IV	9		X
10	Did the organization, directly or through a related organization, hold assets in donor-restricted endowments			l
	or in quasi-endowments? If "Yes," complete Schedule D, Part V	10		X
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X,			
	as applicable.			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,			
	Part VI	11a	Х	
b	Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total			
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		X
С	Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total			٠.,
	assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		X
d	Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in		37	
	Part X, line 16? If "Yes," complete Schedule D, Part IX	11d	X	
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	Х	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses			
	the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f		X
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete	١	v	
	Schedule D, Parts XI and XII	12a	Х	
b	Was the organization included in consolidated, independent audited financial statements for the tax year?			<b>₩</b>
40	If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		_
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,			
	investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000	146		x
15	or more? If "Yes," complete Schedule F, Parts I and IV  Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any	14b		<u> </u>
ıo		45		x
46	foreign organization? If "Yes," complete Schedule F, Parts II and IV  Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to	15		
16		46		x
17	or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16		<u> </u>
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,	17		x
10	column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions	17		<del>  ^</del> `
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines	10		X
10	1c and 8a? If "Yes," complete Schedule G, Part II	18		├^
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"	40		x
20-	complete Schedule G, Part III	19 20a		X
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a 20b		<del>  ^`</del>
b 21	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?  Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or	200		
۲۱	domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21		x
	domestic government on traiting column (-y, interit ii res. complete scriedule i. Parts I and II	41	L	

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Part IV Checklist of Required Schedules (continued) Yes No Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III Х 22 23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes." complete X 23 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Х Schedule K. If "No," go to line 25a 24a **b** Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24b Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 24c d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 25a Х b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Х 25b 26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% Х 26 controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III ....... Х 27 28 Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions): A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes." complete Schedule L, Part IV 28a **b** A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV 28b A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? If 28c "Yes," complete Schedule L, Part IV ...... Did the organization receive more than \$25,000 in noncash contributions? If "Yes," complete Schedule M 29 29 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation Х contributions? If "Yes," complete Schedule M 30 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I Х 31 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes." complete 32 Х Did the organization own 100% of an entity disregarded as separate from the organization under Regulations Х sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 33 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and 34 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)? 35a b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 35b Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? Х 36 If "Yes," complete Schedule R, Part V, line 2 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI Х 37 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Х Note: All Form 990 filers are required to complete Schedule O 38 Statements Regarding Other IRS Filings and Tax Compliance Check if Schedule O contains a response or note to any line in this Part V No Yes 12 **1a** Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable 1a Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable 0 Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?

Form 990 (2023) ASSOCIATION 58-1342588 Page 5

Part V Statements Regarding Other IRS Filings and Tax Compliance Yes No 2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return 2a b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Х 2h X Did the organization have unrelated business gross income of \$1,000 or more during the year? If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O 3b At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a Х financial account in a foreign country (such as a bank account, securities account, or other financial account)? 4a If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? 5a X Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? 5b If "Yes" to line 5a or 5b, did the organization file Form 8886-T? 5c Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? Х 6a If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? 6b Organizations that may receive deductible contributions under section 170(c). 7 Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? Х 7a If "Yes," did the organization notify the donor of the value of the goods or services provided? 7b Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required X to file Form 8282? 7с If "Yes," indicate the number of Forms 8282 filed during the year Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? 7е Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7f If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? 7g If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? 7h Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? 8 9 Sponsoring organizations maintaining donor advised funds. Did the sponsoring organization make any taxable distributions under section 4966? 9a Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? 9b 10 Section 501(c)(7) organizations. Enter: Initiation fees and capital contributions included on Part VIII, line 12 10a Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities Section 501(c)(12) organizations. Enter: Gross income from members or shareholders 11a Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) 11b 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? 12a **b** If "Yes," enter the amount of tax-exempt interest received or accrued during the year ...... 12b Section 501(c)(29) qualified nonprofit health insurance issuers. Is the organization licensed to issue qualified health plans in more than one state? 13a Note: See the instructions for additional information the organization must report on Schedule O. Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans c Enter the amount of reserves on hand Х Did the organization receive any payments for indoor tanning services during the tax year? 14a If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O 14b Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or 15 excess parachute payment(s) during the year? X 15 If "Yes," see the instructions and file Form 4720, Schedule N. X Is the organization an educational institution subject to the section 4968 excise tax on net investment income? 16 If "Yes," complete Form 4720, Schedule O. Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities 17 that would result in the imposition of an excise tax under section 4951, 4952 or 4953?

If "Yes," complete Form 6069.

Form 990 (2023) ASSOCIATION 58-1342588 Page **6** 

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

					X					
Sec	tion A. Governing Body and Management									
				Yes	No					
1a	Enter the number of voting members of the governing body at the end of the tax year	1a	14							
	If there are material differences in voting rights among members of the governing body, or if the governing									
	body delegated broad authority to an executive committee or similar committee, explain on Schedule O.									
b	Enter the number of voting members included on line 1a, above, who are independent	1b	14							
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship									
_	officer, director, trustee, or key employee?		2		х					
3	Did the organization delegate control over management duties customarily performed by or under the		·····   <del>-</del>							
Ü		an cot super violen	3		x					
4	Did the organization make any significant changes to its governing documents since the prior Form 99				X					
5	Did the organization become aware during the year of a significant diversion of the organization's asset				X					
				Х	1					
	<ul> <li>Did the organization have members or stockholders?</li> <li>Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or</li> </ul>									
7a			7a	х						
	more members of the governing body? <b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or									
D		·	7.	х						
•	persons other than the governing body?		7b	Α						
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year	,		х						
a	The governing body?			X						
b	Each committee with authority to act on behalf of the governing body?		<u>8b</u>	_ ^						
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reach the control of the				- V					
500	organization's mailing address? <i>If</i> "Yes," provide the names and addresses on Schedule O		9		X					
360	tion B. Policies (This Section B requests information about policies not required by the Internal Rev	renue Code.)			T					
			-	Yes	No					
	Did the organization have local chapters, branches, or affiliates?		10a		X					
b	If "Yes," did the organization have written policies and procedures governing the activities of such cha	apters, affiliates,								
	•									
	Has the organization provided a complete copy of this Form 990 to all members of its governing body	before filing the for	m? <b>11</b> a	X						
	<b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990.									
12a	7 7 1. 10, 90 10 11. 11. 11. 11. 11. 11. 11. 11. 11.									
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise		12b	X						
С	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Ye	,		v						
	on Schedule O how this was done			_						
13	Did the organization have a written whistleblower policy?			X						
14	Did the organization have a written document retention and destruction policy?		14	X						
15	Did the process for determining compensation of the following persons include a review and approval	•								
	persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			37						
	The organization's CEO, Executive Director, or top management official									
b	Other officers or key employees of the organization		15b	X						
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.									
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangem	ent with a			77					
	taxable entity during the year?		16a	1	X					
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate									
	in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organic									
	exempt status with respect to such arrangements?		16b							
Sec	tion C. Disclosure									
17	List the states with which a copy of this Form 990 is required to be filedNONE									
18	Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and	d 990-T (section 50	1(c)(3)s only	) availa	ble					
	for public inspection. Indicate how you made these available. Check all that apply.									
	· ,	on Schedule O)								
19	Describe on Schedule O whether (and if so, how) the organization made its governing documents, cor	iflict of interest poli	cy, and finar	ncial						
	statements available to the public during the tax year.									
20	State the name, address, and telephone number of the person who possesses the organization's book	ks and records								
	MATT ABELE - 919-832-7601									
	4800 SIX FORKS RD, SUITE 300, RALEIGH, NC 27609									

Form 990 (2023) ASSOCIATION 58-1342588 Page 7

# Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

   List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation.
- Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations. See the instructions for the order in which to list the persons above.

Check this box if neither the organization no	or any related	orga	niza	tion	con	npen	sate	ed any current officer, di	rector, or trustee.	
(A)	(B)		(C)					(D)	(E)	(F)
Name and title	Average	(do		Pos			ne	Reportable	Reportable	Estimated
	hours per	box.	(do not check more than one box, unless person is both an officer and a director/trustee)		an	compensation	compensation	amount of		
	week		er an	la a a	a director/trustee)		.ee)	from	from related	other
	(list any	irecto						the	organizations	compensation
	hours for related	e or d	tee			sated		organization (W-2/1099-MISC/	(W-2/1099-MISC/ 1099-NEC)	from the organization
	organizations	Individual trustee or director	Institutional trustee		yee	Highest compensated employee		1099-NEC)	1000 NEO)	and related
	below	idual	ution	<u>~</u>	Key employee	st co oyee	er	,		organizations
	line)	Indiv	Instit	Officer	Key 6	High empl	Former			
(1) CASSIE GAVIN - HIGHLY COMPENSAT	45.00									
DIRECTOR OF POLICY						Х		133,171.	0.	6,132.
(2) WARD LENZ	45.00									
EXECUTIVE DIRECTOR				Х				110,428.	0.	5,049.
(3) ETHAN BLUMENTHAL - HIGHLY COMPE	45.00									
POLICY STRATEGIST						Х		103,571.	0.	6,132.
(4) MATT ABELE	45.00								_	
EXECUTIVE DIRECTOR				Х				100,361.	0.	6,532.
(5) KAREN GARDNER - HIGHLY COMPENSA	45.00									
DIRECTOR OF CORE SERVICES						Х		101,664.	0.	1,732.
(6) VANESSA KING	2.00									
CHAIR 1/1/2023 THROUGH 12/21/2023	1 00	Х		Х				0.	0.	0.
(7) CHASE COUNTS	1.00									_
CO-CHAIR 1/1/2023 THROUGH 12/21/2023		Х						0.	0.	0.
(8) SARA TELANO	1.00									
CHAIR OF FINANCE & AUDIT COMMITTEE 1		Х		Х				0.	0.	0.
(9) ROGELIO SULLIVAN	1.00									
CHAIR OF NOMINATING & GOVERNANCE COM	1 00	Х						0.	0.	0.
(10) JULIO ROVI	1.00								•	
CHAIR OF DEVELOPMENT STRATEGY OVERSI	1 00	Х						0.	0.	0.
(11) HAYES FRAMME	1.00								•	•
CHAIR OF INDUSTRY/POLICY ALIGNMENT C	1 00	Х						0.	0.	0.
(12) KEN DULANEY	1.00			,,					0	•
SECRETARY 1/1/2023 THROUGH 12/21/202	2 00	X		Х				0.	0.	0.
(13) RIZA JENKINS	2.00			,,					0	0
CHAIR EFFECTIVE 1/1/2024	1 00	Х		Х				0.	0.	0.
(14) STEVE KALLAND	1.00	7.7							0	0
BOARD MEMBER	1 00	Х						0.	0.	0.
(15) CLINT LLOYD	1.00	v							0	0
BOARD MEMBER UNTIL 12/31/2023 (16) TAREK ABDEL-SALAM	1 00	Х						0.	0.	0.
BOARD MEMBER	1.00	Х						0.	0.	0.
(17) KRISTINA TINA CLOSSICK	1.00	Λ						0.	0.	<u> </u>
CO-CHAIR OF DEVELOPMENT STRATEGY OVE	1.00	Х						0.	0.	0.
	I	27		<u> </u>				1 0.	<b>0</b> •	Form <b>990</b> (2022)

332007 12-21-23 Form **990** (2023)

58-1342588 ASSOCIATION Page 8 Form 990 (2023)

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)													
(A) (B) (C)						(D)	(E)			(F)			
Name and title	Average	١,,		Pos				Reportable	Reportable				ed
	hours per	box	, unle	ss per	rson i	than o	n an	compensation	compensation			nount (	
	week		cer ar	nd a d	irecto	or/trus	tee)	from	from related			other	
	(list any	director						the	organizations		com	pensa	tion
	hours for	or dir	يو			ated		organization	(W-2/1099-MISC	;/		om the	
	related organizations	ıstee	truste		a.	bens		(W-2/1099-MISC/	1099-NEC)		•	anizati	
	below	ual tn	ional		ploye	t com	١.	1099-NEC)				d relate anizatio	
	line)	Individual trustee or	Institutional trustee	Officer	Key employee	Highest compensated employee	Former				orga	ainzan	2115
(18) LAURA COMBS	1.00	=	=	0	×	工业	т.			$\dashv$			
CO-CHAIR OF DEVELOPMENT STRATEGY OVE	1.00	Х						0.		٥.١			0.
(19) USMAN NOOR	1.00	22						0.		<del>' '</del>			<u> </u>
BOARD MEMBER	1.00	Х						0.		٥.١			0.
(20) GRAHAM LEWIS	1.00	- 22				$\vdash$		0.		$\stackrel{\cdot \cdot \cdot }{\rightarrow}$			<u> </u>
SECRETARY EFFECTIVE 1/1/2024	1.00	Х		Х				0.		٥.١			0.
(21) GREG LENNON	1.00	Δ		^				0.	,	<del>'  </del>			<u> </u>
CHAIR OF FINANCE & AUDIT COMMITTEE E	1.00	Х		Х				0.		٥.			0.
(22) MOZINE LOWE	1.00	Λ		Λ	_	$\vdash$		0.		<del>'  </del>			<u> </u>
	1.00	Х						0.		٥.			0.
BOARD MEMBER	1.00	Λ				-		0.		<del>'  </del>			<u> </u>
(23) RUBENKA BANDYOPADHYAY - THRU 02	1.00	₩.								٥.			٥
BOARD MEMBER LEFT THE BOARD 2/2023	1 00	Х				-		0.		<del>-  </del>			0.
(24) BEN PROCHAZKA - THUR 04/2023	1.00	<b>.</b>								۱ ۸			٥
BOARD MEMBER LEFT THE BOARD 4/2023	-	Х				-		0.		0.			0.
		-											
										$\dashv$			
		-											
								F 4 0 1 0 F		$\dashv$	2		77
1b Subtotal								549,195.		0.			
c Total from continuation sheets to Part VI								0.		0.			
d Total (add lines 1b and 1c)								549,195.		<i>J</i> •	4	3,3	<i>/ / •</i>
2 Total number of individuals (including but n	ot limited to th	ose	liste	d ab	ove	e) wh	o re	eceived more than \$100,	000 of reportable				7
compensation from the organization										—		Vaa	No.
										ſ		Yes	No
3 Did the organization list any <b>former</b> officer,		ee, k	кеу е	empl	oye	e, or	hig	phest compensated empl	loyee on		_		37
line 1a? If "Yes," complete Schedule J for s											3		X
4 For any individual listed on line 1a, is the su	•							•	•		-		37
and related organizations greater than \$150											4		<u> </u>
5 Did any person listed on line 1a receive or a	•				,			J					77
rendered to the organization? If "Yes." com	plete Schedul	e J f	or su	ıch <u>ı</u>	oers	on					5		X
Section B. Independent Contractors										—			
1 Complete this table for your five highest co	=								· · · · · · · · · · · · · · · · · · ·	nsat	ion fro	om	
the organization. Report compensation for	the calendar ye	ear e	endir	ng w	ith c	or wi	thin		ear.	—			
<b>(A)</b> Name and business	addraga	37/	<b>~</b> ****	,				(B)	ontions	_	(C		_
Name and business	address	N	INC	<u> </u>			-	Description of s	ervices		ompei	nsation	<u> </u>
							-						
2 Total number of independent contractors (in	-	ot lir	nited	d to	_	_	ted	above) who received mo	ore than				
\$100,000 of compensation from the organization	zation				(	J							

\$100,000 of compensation from the organization

ASSOCIATION 58-1342588 Page 9 Form 990 (2023) Part VIII Statement of Revenue Check if Schedule O contains a response or note to any line in this Part VIII (B) (C) (D) Related or exempt Unrelated Revenue excluded Total revenue from tax under function revenue business revenue sections 512 - 514 Contributions, Gifts, Grants and Other Similar Amounts 1 a Federated campaigns ..... 1a 121,057. 1b **b** Membership dues c Fundraising events ..... 1c d Related organizations 1d e Government grants (contributions) 1e f All other contributions, gifts, grants, and 1,893,480. similar amounts not included above ... 1f **q** Noncash contributions included in lines 1a-1f 2,014,537. h Total. Add lines 1a-1f **Business Code** 116,098. 2 a CONSULTING FEES 116,098. 611710 Program Service Revenue 52,860. **b REGISTRATION FEES** 611710 52,860. С f All other program service revenue ..... 168,958. g Total. Add lines 2a-2f Investment income (including dividends, interest, and 18,344. 18,344 other similar amounts) Income from investment of tax-exempt bond proceeds 5 Royalties ..... (i) Real (ii) Personal 94,430. 6 a Gross rents 0. **b** Less: rental expenses ... 94,430. c Rental income or (loss) 94,430. 94,430. d Net rental income or (loss) (i) Securities (ii) Other 7 a Gross amount from sales of 400. assets other than inventory 7a b Less: cost or other basis 308. Other Revenue and sales expenses ...... 7b 92. 92. 92. d Net gain or (loss) 8 a Gross income from fundraising events (not including \$ contributions reported on line 1c). See Part IV, line 18 **b** Less: direct expenses c Net income or (loss) from fundraising events 9 a Gross income from gaming activities. See Part IV, line 19 9a **b** Less: direct expenses 9b c Net income or (loss) from gaming activities 10 a Gross sales of inventory, less returns and allowances 10a **b** Less: cost of goods sold c Net income or (loss) from sales of inventory **Business Code** 11 a MISCELLANEOUS INCOME 900099 830. 830. b d All other revenue

830.

169,880.

2,297,191.

e Total. Add lines 11a-11d

Total revenue. See instructions

Form 990 (2023) ASSOCIATION
Part IX Statement of Functional Expenses

58-1342588 Page **10** 

	on 501(c)(3) and 501(c)(4) organizations must compl		er organizations must con	nplete column (A)	
00011	Check if Schedule O contains a respons			ipioto columni (A).	
	not include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	( <b>D</b> ) Fundraising expenses
1	Grants and other assistance to domestic organizations				
	and domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic				
	individuals. See Part IV, line 22				
3	Grants and other assistance to foreign				
	organizations, foreign governments, and foreign				
	individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors,	E74 771	477 040	02 101	12 020
_	trustees, and key employees	574,771.	477,840.	83,101.	13,830.
6	Compensation not included above to disqualified				
	persons (as defined under section 4958(f)(1)) and				
-	persons described in section 4958(c)(3)(B)	519,284.	431,238.	76,161.	11,885.
7	Other salaries and wages  Pension plan accruals and contributions (include	J19,404•	431,430.	70,101.	11,000.
8	section 401(k) and 403(b) employer contributions	4 549	3,871.	454	221
9	Other employee benefits	4,549. 43,435.	36,957.	454. 4,336.	2 142
10		87,784.	72,599.	13,184.	224. 2,142. 2,001.
11	Payroll taxes  Fees for services (nonemployees):	07,704.	12,355.	13,104.	2,001
	Management	127,052.	98,525.	25,815.	2,712.
	Legal	127,0320	30/3231	23,0131	2,7120
	Accounting				
	Lobbying	59,488.	46,131.	12,087.	1,270.
	Professional fundraising services. See Part IV, line 17	7777		==/,	
f	Investment management fees				
g					
J	column (A), amount, list line 11g expenses on Sch 0.)	180,594.	140,045.	36,694.	3,855.
12	Advertising and promotion	39,672.	30,764.	8,061.	847.
13	Office expenses	46,092.	36,015.	8,720.	1,357.
14	Information technology	49,530.	38,543.	9,629.	1,358.
15	Royalties				
16	Occupancy	193,549.	150,641.	37,539. 1,238.	5,369.
17	Travel	22,840.	21,576.	1,238.	26.
18	Payments of travel or entertainment expenses				
	for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	91,268.	91,268.		
20	Interest	4.6			
21	Payments to affiliates	40.		40.	
22	Depreciation, depletion, and amortization	17,343.	2 000	17,343.	
23	Insurance	11,609.	3,270.	8,339.	
24	Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule 0.)				
а	LOSS ON IMPAIRMENT	32,000.		32,000.	
b	MISCELLANEOUS EXPENSE	30,126.	24,447.	4,843.	836.
c	ASSOCIATION EXPENSES	16,069.	4,577.	11,492.	
d	REPAIRS & MAINTENANCE	853.	664.	165.	24.
-	All other expenses				
25	Total functional expenses. Add lines 1 through 24e	2,147,948.	1,708,971.	391,241.	47,736.
26	Joint costs. Complete this line only if the organization	-	-	-	-
	reported in column (B) joint costs from a combined				
	educational campaign and fundraising solicitation.				
	Check here if following SOP 98-2 (ASC 958-720)				
					E 000 (2222)

Form 990 (2023)
Part X Balance Sheet ASSOCIATION 58-1342588 Page **11** 

Pai	τx	Balance Sneet					
		Check if Schedule O contains a response or n	ote to an	y line in this Part X			
					<b>(A)</b> Beginning of year		<b>(B)</b> End of year
	1	Cash - non-interest-bearing	554,881.	1	431,113.		
	2	Savings and temporary cash investments			939,635.	2	1,271,558.
	3	Pledges and grants receivable, net			70,000.	3	25,000.
	4	Accounts receivable, net	94,749.	4	63,458.		
	5	Loans and other receivables from any current					
		trustee, key employee, creator or founder, sub					
		controlled entity or family member of any of the		5			
	6	Loans and other receivables from other disqu					
		under section 4958(f)(1)), and persons describ	ed in sec	tion 4958(c)(3)(B)		6	
S	7	Notes and loans receivable, net				7	
Assets	8	Inventories for sale or use				8	
As	9	5			25,851.	9	23,623.
	10a	Land, buildings, and equipment: cost or other	·				
		basis. Complete Part VI of Schedule D	10a	231,087.			
	b				25,765.	10c	9,393.
	11	Investments - publicly traded securities		11			
	12	Investments - other securities. See Part IV, line		12			
	13	Investments - program-related. See Part IV, lin		13			
	14	Intangible assets	32,000.	14	0.		
	15	Other assets. See Part IV, line 11		333,481.	15	148,494.	
	16	Total assets. Add lines 1 through 15 (must ed	2,076,362.	16	1,972,639.		
	17	Accounts payable and accrued expenses			170,137.	17	124,744.
	18	Grants payable		18			
	19	Deferred revenue		75,557.	19	66,026.	
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability. Complet	e Part IV	of Schedule D		21	
S	22	Loans and other payables to any current or fo	rmer offic	er, director,			
≝		trustee, key employee, creator or founder, sub	ostantial c	contributor, or 35%			
Liabilities		controlled entity or family member of any of the	iese pers	ons		22	
	23	Secured mortgages and notes payable to unre		· · · · · · · · · · · · · · · · · · ·		23	
	24	Unsecured notes and loans payable to unrelate	ted third p	parties		24	
	25	Other liabilities (including federal income tax,	payables	to related third			
		parties, and other liabilities not included on lin	es 17-24)	. Complete Part X	064 445		1.50 1.00
		of Schedule D		·····	361,445.	25	163,403.
	26	Total liabilities. Add lines 17 through 25			607,139.	26	354,173.
"		Organizations that follow FASB ASC 958, c	heck her	e X			
čě		and complete lines 27, 28, 32, and 33.			1 000 600		1 006 202
<u>la</u>	27	Net assets without donor restrictions	1,093,637.	27	1,296,383.		
Ä	28	Net assets with donor restrictions			375,586.	28	322,083.
Ĕ		Organizations that do not follow FASB ASC					
F		and complete lines 29 through 33.					
ţ	29	Capital stock or trust principal, or current fund				29	
sse	30	Paid-in or capital surplus, or land, building, or				30	
Net Assets or Fund Balances	31	Retained earnings, endowment, accumulated			1 460 000	31	1 610 466
Š	32	Total net assets or fund balances			1,469,223.	32	1,618,466.
	33	Total liabilities and net assets/fund balances			2,076,362.	33	1,972,639.

Form **990** (2023)

Form 990 (2023) ASSOCIATION 58-1342588 Page 12

Pa	rt XI Reconciliation of Net Assets							
	Check if Schedule O contains a response or note to any line in this Part XI							
1	Total revenue (must equal Part VIII, column (A), line 12)	1	2,29	7,19	<u>91.</u>			
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,14	7,94	<u> 48.</u>			
3	Revenue less expenses. Subtract line 2 from line 1	3		9,24				
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	1,46	9,22	<u>23.</u>			
5	Net unrealized gains (losses) on investments							
6	Donated services and use of facilities	6						
7	Investment expenses	7						
8	Prior period adjustments	8						
9	Other changes in net assets or fund balances (explain on Schedule O)	9			0.			
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32,							
	column (B))	10	1,61	8,46	<u> 56.</u>			
Pa	rt XII Financial Statements and Reporting							
	Check if Schedule O contains a response or note to any line in this Part XII							
				Yes	No			
1	Accounting method used to prepare the Form 990: Cash X Accrual Other		_					
	If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule	Ο.						
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		2a		_X_			
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed	on a						
	separate basis, consolidated basis, or both:							
	Separate basis Consolidated basis Both consolidated and separate basis							
b	Were the organization's financial statements audited by an independent accountant?		2b	X				
	If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate	basis,						
	consolidated basis, or both:							
	X Separate basis Consolidated basis Both consolidated and separate basis							
С	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the	audit,			ı			
	review, or compilation of its financial statements and selection of an independent accountant?		2c	X				
	If the organization changed either its oversight process or selection process during the tax year, explain on Sch	edule O.						
За	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the				ı			
	Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		3a		_X_			
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the requi	red audit			ı			
	or audits, explain why on Schedule O and describe any steps taken to undergo such audits		3b					

Form **990** (2023)

#### **SCHEDULE A**

(Form 990)

Total

Department of the Treasury Internal Revenue Service

### **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

NORTH CAROLINA SUSTAINABLE ENERGY **Employer identification number** Name of the organization ASSOCIATION 58-1342588 Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions. The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.) A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990).) 3 A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.) 6 A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). X An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.) A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) 11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g. Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B. Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C. Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E. Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V. Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization. Enter the number of supported organizations Provide the following information about the supported organization(s). (iv) Is the organization listed (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other in your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) Yes above (see instructions))

ASSOCIATION Schedule A (Form 990) 2023

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Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi) Part II

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Sec	Section A. Public Support										
Cale	ndar year (or fiscal year beginning in)	(a) 2019	<b>(b)</b> 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total				
1	Gifts, grants, contributions, and										
	membership fees received. (Do not										
	include any "unusual grants.")	1924921.	3363644.	2792792.	2109899.	2014537.	12205793.				
2	Tax revenues levied for the organ-										
	ization's benefit and either paid to										
	or expended on its behalf										
3	The value of services or facilities										
	furnished by a governmental unit to										
	the organization without charge										
4	Total. Add lines 1 through 3	1924921.	3363644.	2792792.	2109899.	2014537.	12205793.				
5	The portion of total contributions										
	by each person (other than a										
	governmental unit or publicly										
	supported organization) included										
	on line 1 that exceeds 2% of the										
	amount shown on line 11,										
	column (f)						441,326.				
6	Public support. Subtract line 5 from line 4.						11764467.				
	ction B. Total Support										
	ndar year (or fiscal year beginning in)	<b>(a)</b> 2019	<b>(b)</b> 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total				
	Amounts from line 4	1924921.	3363644.	2792792.	2109899.	2014537.	12205793.				
8	Gross income from interest,										
•	dividends, payments received on										
	securities loans, rents, royalties,										
	and income from similar sources	7,528.	1,616.	2,407.	11,202.	112,774.	135,527.				
9	Net income from unrelated business	7,73201	1,010	2,10,1	11,2021		133,3274				
9	activities, whether or not the										
	business is regularly carried on										
10	Other income. Do not include gain										
10	or loss from the sale of capital										
	·										
44	assets (Explain in Part VI.)						12341320.				
11		ete (eee instructio	, no)			12	761,934.				
12	Gross receipts from related activities, First 5 years. If the Form 990 is for the			fourth or fifth town			701,554.				
13		-		•							
Sec	organization, check this box and stop ction C. Computation of Publi				• • • • • • • • • • • • • • • • • • • •						
	Public support percentage for 2023 (I			column (f)\		14	95.33 %				
	Public support percentage from 2022					15	96.42 %				
	33 1/3% support test - 2023. If the										
10a	stop here. The organization qualifies	-					T				
h	33 1/3% support test - 2022. If the o		-		line 15 in 22 1/20/						
U		-									
47-	and <b>stop here.</b> The organization qual				10 10 10-						
1/a	10% -facts-and-circumstances test										
	and if the organization meets the fact			=	· ·	vi now the organiz	zation				
	meets the facts-and-circumstances te	· ·	•			7	1004				
b	10% -facts-and-circumstances test	-					10% or				
	more, and if the organization meets the				-	-41					
	organization meets the facts-and-circu		-		•						
18	Private foundation. If the organization	n did not check a	box on line 13, 16a	a, 16b, 1/a, or 17b	, cneck this box a		(Form 000) 2002				

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Part III | Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below please complete Part II.)

Section A. Public Support	below, please com	piete Part II.)				
Calendar year (or fiscal year beginning in)	(a) 2019	<b>(b)</b> 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
1 Gifts, grants, contributions, and	. ,			,	,	
membership fees received. (Do not						
include any "unusual grants.")						
2 Gross receipts from admissions,						
merchandise sold or services per-						
formed, or facilities furnished in						
any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that						
are not an unrelated trade or bus-						
iness under section 513						
4 Tax revenues levied for the organ-						
ization's benefit and either paid to						
or expended on its behalf						
5 The value of services or facilities						
furnished by a governmental unit to						
the organization without charge						
6 Total. Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and						
3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received						
from other than disqualified persons that						
exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						
Section B. Total Support	'		•	•		
Calendar year (or fiscal year beginning in)	(a) 2019	<b>(b)</b> 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
9 Amounts from line 6						
10a Gross income from interest,						
dividends, payments received on						
securities loans, rents, royalties, and income from similar sources						
<b>b</b> Unrelated business taxable income						
(less section 511 taxes) from businesses						
acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business						
activities not included on line 10b,						
whether or not the business is regularly carried on						
12 Other income. Do not include gain						
or loss from the sale of capital						
assets (Explain in Part VI.)						
14 First 5 years. If the Form 990 is for t	he organization's f	irst second third	fourth, or fifth tax	vear as a section !	501(c)(3) organizatio	on.
check this box and <b>stop here</b>	J		•	•	( )( )	<i>'</i>
Section C. Computation of Pub						
15 Public support percentage for 2023	(line 8, column (f),	divided by line 13,	column (f))		15	%
16 Public support percentage from 202	2 Schedule A, Part	: III, line 15			16	%
Section D. Computation of Inve	stment Incom	e Percentage				
17 Investment income percentage for 2	:023 (line 10c, colu	ımn (f), divided by l	ine 13, column (f))		17	%
18 Investment income percentage from	<b>2022</b> Schedule A.	, Part III, line 17			18	%
<b>19a 33 1/3% support tests - 2023.</b> If th	e organization did	not check the box	on line 14, and line	e 15 is more than 3	33 1/3%, and line 1	7 is not
more than 33 1/3%, check this box a	and <b>stop here.</b> The	e organization qual	ifies as a publicly s	supported organiza	ation	
b 33 1/3% support tests - 2022. If th	e organization did	not check a box or	n line 14 or line 19a	a, and line 16 is m	ore than 33 1/3%, a	and
line 18 is not more than 33 1/3%, ch	eck this box and <b>s</b>	t <b>op here.</b> The orga	anization qualifies a	as a publicly supp	orted organization	
20 Private foundation. If the organizati	on did not check a	box on line 14, 19	a, or 19b, check th	his box and see in:	structions	

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### Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

### Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes." answer lines 3b and 3c below.
- b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- 4a Was any supported organization not organized in the United States ("foreign supported organization")? |f "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.
- b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes." answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).
- Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes." complete Part I of Schedule L (Form 990).
- 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI.
- Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes." provide detail in Part VI.
- c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes." provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.
  - b Did the organization have any excess business holdings in the tax year? (Use Schedule C. Form 4720, to determine whether the organization had excess business holdings.)

		Voc	No
		Yes	No
	1		
	2		
	3a		
	3b		
	3с		
	4a		
	4b		
	4c		
	5a		
	5b		
	5c		
	6		
	7		
	8		
	9a		
	9b		
	9с		
	10a		
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Pa	rt IV   Supporting Organizations <sub>(continued)</sub>			
			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
а	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and			
	11c below, the governing body of a supported organization?	11a		
b	A family member of a person described on line 11a above?	11b		
С	A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide			
	detail in Part VI.	11c		
Sec	tion B. Type I Supporting Organizations			
			Yes	No
1	Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported			
	organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1		
2	Did the organization operate for the benefit of any supported organization other than the supported			
	organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in			
	Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,			
	supervised, or controlled the supporting organization.	2		
Sec	tion C. Type II Supporting Organizations	•		
			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors			
	or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control			
	or management of the supporting organization was vested in the same persons that controlled or managed			
	the supported organization(s).	1		
Sec	tion D. All Type III Supporting Organizations	<u> </u>		
	<i>y</i> , 11 5 5		Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the		100	140
•	organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax			
	year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the	4		
0	organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported			
	organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how			
•	the organization maintained a close and continuous working relationship with the supported organization(s).	2		
3	By reason of the relationship described on line 2, above, did the organization's supported organizations have a			
	significant voice in the organization's investment policies and in directing the use of the organization's			
	income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's	_		
800	supported organizations played in this regard.	3		
Sec	tion E. Type III Functionally Integrated Supporting Organizations			
1 a	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)  The organization satisfied the Activities Test. Complete line 2 below.	<b>)</b> -		
b	The organization is the parent of each of its supported organizations. Complete line 3 below.			
С	The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in	struction	ıs).	
2	Activities Test. Answer lines 2a and 2b below.		Yes	No
а	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of			
	the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify			
	those supported organizations and explain how these activities directly furthered their exempt purposes,			
	how the organization was responsive to those supported organizations, and how the organization determined			
	that these activities constituted substantially all of its activities.	2a		
b	Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement,			
	one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in			
	Part VI the reasons for the organization's position that its supported organization(s) would have engaged in			
	these activities but for the organization's involvement.	2b		
3	Parent of Supported Organizations. <b>Answer lines 3a and 3b below.</b>			
а	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or			
	trustees of each of the supported organizations? If "Yes" or "No" provide details in <b>Part VI.</b>	За		
b	Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each			
	of its supported organizations? If "Yes." describe in Part VI the role played by the organization in this regard.	3b		

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	t V Type III Non-Functionally Integrated 509(a)(3) Supporting	g Orga	nizations	o 10111000 rage 0
1	Check here if the organization satisfied the Integral Part Test as a qualifying	g trust on	Nov. 20, 1970 ( explain in l	Part VI). See instructions.
	All other Type III non-functionally integrated supporting organizations must		-	•
Sect	ion A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1		
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		
4	Add lines 1 through 3.	4		
5	Depreciation and depletion	5		
6	Portion of operating expenses paid or incurred for production or			
	collection of gross income or for management, conservation, or			
	maintenance of property held for production of income (see instructions)	6		
7	Other expenses (see instructions)	7		
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8		
Sect	ion B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see			
	instructions for short tax year or assets held for part of year):			
a	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
c	Fair market value of other non-exempt-use assets	1c		
d	Total (add lines 1a, 1b, and 1c)	1d		
е	Discount claimed for blockage or other factors			
	(explain in detail in Part VI):			
2	Acquisition indebtedness applicable to non-exempt-use assets	2		
_3_	Subtract line 2 from line 1d.	3		
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount,			
	see instructions).	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6	Multiply line 5 by 0.035.	6		
_7_	Recoveries of prior-year distributions	7		
8	Minimum Asset Amount (add line 7 to line 6)	8		
Sect	ion C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1		
2	Enter 0.85 of line 1.	2		
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3		
4	Enter greater of line 2 or line 3.	4		
5	Income tax imposed in prior year	5		
6	Distributable Amount. Subtract line 5 from line 4, unless subject to			
	emergency temporary reduction (see instructions).	6		
7	Check here if the current year is the organization's first as a non-functionall	y integra	ted Type III supporting orga	nization (see
	instructions).			

Schedule A (Form 990) 2023

<u>Schedule A (Form 990) 2023</u> **ASSOCIATION** 58-1342588 Page 7

Par	t V Type III Non-Functionally Integrated 509(	a)(3) Supporting Orga	inizations (continue	ed)	<u> </u>
Secti	on D - Distributions		·		Current Year
1	Amounts paid to supported organizations to accomplish exer	mpt purposes		1	
2	Amounts paid to perform activity that directly furthers exemp	t purposes of supported			
	organizations, in excess of income from activity		2		
_3_	Administrative expenses paid to accomplish exempt purpose	es of supported organizations	s	3	
4	Amounts paid to acquire exempt-use assets			4	
5	Qualified set-aside amounts (prior IRS approval required - pro		5		
6	Other distributions (describe in Part VI). See instructions.			6	
_7_	Total annual distributions. Add lines 1 through 6.		7		
8	Distributions to attentive supported organizations to which the				
	(provide details in Part VI). See instructions.			8	
9	Distributable amount for 2023 from Section C, line 6			9	
10	Line 8 amount divided by line 9 amount			10	
Secti	on E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions	<b>S</b>	(iii) Distributable
			Pre-2023		Amount for 2023
1	Distributable amount for 2023 from Section C, line 6				
2	Underdistributions, if any, for years prior to 2023 (reason-				
	able cause required - explain in Part VI). See instructions.				
3	Excess distributions carryover, if any, to 2023				
a	From 2018				
b	From 2019				
С	From 2020				
d	From 2021				
е	From 2022				
f	Total of lines 3a through 3e				
g	Applied to underdistributions of prior years				
h	Applied to 2023 distributable amount				
i_	Carryover from 2018 not applied (see instructions)				
<u>j</u>	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.				
4	Distributions for 2023 from Section D,				
	line 7:				
<u>a</u>	Applied to underdistributions of prior years				
b	Applied to 2023 distributable amount				
c	Remainder. Subtract lines 4a and 4b from line 4.				
5	Remaining underdistributions for years prior to 2023, if				
	any. Subtract lines 3g and 4a from line 2. For result greater				
	than zero, explain in Part VI. See instructions.				
6	Remaining underdistributions for 2023. Subtract lines 3h				
	and 4b from line 1. For result greater than zero, explain in				
	Part VI. See instructions.				
7	Excess distributions carryover to 2024. Add lines 3j				
	and 4c.				
_8_	Breakdown of line 7:				
	Excess from 2019				
	Excess from 2020				
	Excess from 2021				
	Excess from 2022				
<u> </u>	Excess from 2023				

Schedule A (Form 990) 2023

58-134<u>2588 Page 8</u> ASSOCIATION Schedule A (Form 990) 2023 Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

<u>ASSOCIATION</u> 58-1342588

### Schedule A

# Identification of Excess Contributions Included on Part II, Line 5

2023

\*\* Do Not File \*\*

\*\*\* Not Open to Public Inspection \*\*\*

Contributor's Name	Total Contributions	Excess Contributions
COASTAL FEDERAL CREDIT UNION	688,152.	441,326.
otal Excess Contributions to Schedule A, Part II, Line 5		441,326.

Schedule B

(Form 990)

**Schedule of Contributors** 

OMB No. 1545-0047

2023

Department of the Treasury Internal Revenue Service

Name of the organization

Attach to Form 990, 990-EZ, or 990-PF.
Go to www.irs.gov/Form990 for the latest information.

NORTH CAROLINA SUSTAINABLE ENERGY
ASSOCIATION

58-1342588

**Employer identification number** 

Organization type (check one):

Filers of:		Section:
Form 990	or 990-EZ	X 501(c)( 3 ) (enter number) organization
		4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
		527 political organization
Form 990	-PF	501(c)(3) exempt private foundation
		4947(a)(1) nonexempt charitable trust treated as a private foundation
		501(c)(3) taxable private foundation
•	-	covered by the <b>General Rule</b> or a <b>Special Rule.</b> 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.
General I	Rule	
	-	filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.
Special F	lules	
:	sections 509(a)(1) a contributor, during	described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under nd 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; line 1. Complete Parts I and II.
1	contributor, during iterary, or education	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, nal purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering instead of the contributor name and address), II, and III.
; ;	year, contributions s checked, enter he ourpose. Don't com	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., applete any of the parts unless the General Rule applies to this organization because it received nonexclusively etc., contributions totaling \$5,000 or more during the year \$
answer "I	lo" on Part IV, line	at isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it <b>must</b> 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify requirements of Schedule B (Form 990).

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2023)

Schedule B (Form 990) (2023)

	9-
Name of organization	Employer identification number
NORTH CAROLINA SUSTAINABLE ENERGY	
ASSOCIATION	58-1342588

Part I	Contributors (see instructions). Use duplicate copies of Part I if ac	dditional space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$\$\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	Name, address, and 2n + 4	\$ 350,375.	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3		\$\$	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b)	(c) Total contributions	(d) Type of contribution
4	Name, address, and ZIP + 4	\$ 120,000.	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)

Schedule B (Form 990) (2023)

Name of organization
NORTH CAROLINA SUSTAINABLE ENERGY
ASSOCIATION
Employer identification number
58-1342588

Part II	encash Property (see instructions). Use duplicate copies of Part II if additional space is needed.					
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		<u></u>				
		\$				
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
	_					
		\$				
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		\$				
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received			
		1 <b>C</b>	I			

Schedule B (Form 990) (2023)

Page 4

Name of organization **Employer identification number** NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION 58-1342588 Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) \$ Use duplicate copies of Part III if additional space is needed. (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

SCHEDULE C (Form 990)

### **Political Campaign and Lobbying Activities**

For Organizations Exempt From Income Tax Under Section 501(c) and Section 527

Complete if the organization is described below. Attach to Form 990 or Form 990-EZ. Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2023
Open to Public

Inspection

Department of the Treasury Internal Revenue Service

If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:

• Section 501(c)(4), (5), or (6) organizations: Complete Part III. Name of organization **Employer identification number** NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION 58-1342588 Complete if the organization is exempt under section 501(c) or is a section 527 organization. Part I-A 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. 2 Political campaign activity expenditures Volunteer hours for political campaign activities Complete if the organization is exempt under section 501(c)(3). 1 Enter the amount of any excise tax incurred by the organization under section 4955 2 Enter the amount of any excise tax incurred by organization managers under section 4955 \_\_\_\_\_\_\$ \_\_\_\_ 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? No 4a Was a correction made? Yes Nο b If "Yes," describe in Part IV. Complete if the organization is exempt under section 501(c), except section 501(c)(3). Part I-C 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b Did the filing organization file Form 1120-POL for this year? Enter the names, addresses, and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV. (d) Amount paid from (a) Name (b) Address (c) EIN (e) Amount of political contributions received and filing organization's promptly and directly funds. If none, enter -0-. delivered to a separate political organization. If none, enter -0-.

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990) 2023	ASSOCIA					342588 Page 2
Part II-A Complete if the org	ganization	is exem	npt under section	501(c)(3) and file	ed Form 5768 (ele	ction under
section 501(h)).						
	•		•	Part IV each affiliated	group member's name	e, address, EIN,
expenses, and sha			• •	data a a a a b		
B Check if the filing organize	ation checked	box A an	d "limited control" pro	visions apply.	(a) Filia a	(In) Affiliated annual
	its on Lobbyi				(a) Filing organization's	(b) Affiliated group totals
(The term "expen	iditures" mea	ns amoui	nts paid or incurred.)		totals	
1a Total lobbying expenditures to infl	luence public	opinion (g	rassroots lobbying)			
<b>b</b> Total lobbying expenditures to infl	luence a legisl	ative body	y (direct lobbying)		65,056.	
c Total lobbying expenditures (add l	lines 1a and 1I	b)			65,056. 2,088,459.	
	d Other exempt purpose expenditures					
e Total exempt purpose expenditure	es (add lines 1	c and 1d)			2,153,515.	
f Lobbying nontaxable amount. Ent	ter the amount	from the	following table in both	columns.	257,676.	
If the amount on line 1e, column (a)	or (b) is:	The lobi	bying nontaxable amo	ount is:		
not over \$500,000,		20% of t	he amount on line 1e.			
over \$500,000 but not over \$1,000	0,000,	\$100,00	0 plus 15% of the exce	ess over \$500,000.		
over \$1,000,000 but not over \$1,5	500,000,	\$175,00	0 plus 10% of the exce	ess over \$1,000,000.		
over \$1,500,000 but not over \$17	,000,000,	\$225,00	0 plus 5% of the exces	s over \$1,500,000.		
over \$17,000,000,		\$1,000,0	000.			
g Grassroots nontaxable amount (er	nter 25% of lin	e 1f)			64,419.	
					_	
h Subtract line 1g from line 1a. If ze	ro or less, ente	er -0			0.	
i Subtract line 1f from line 1c. If zer	o or less, ente	r -0			0.	
<ul><li>i Subtract line 1f from line 1c. If zer</li><li>j If there is an amount other than ze</li></ul>	o or less, ente ero on either li	r -0	ine 1i, did the organiza	tion file Form 4720		
i Subtract line 1f from line 1c. If zer	o or less, ente ero on either li year?	r -0 ne 1h or li				Yes No
Subtract line 1f from line 1c. If zer     If there is an amount other than zer     reporting section 4911 tax for this	o or less, ente ero on either lii year?	r -0 ne 1h or li  <b>Year Ave</b>	raging Period Under	Section 501(h)	0.	
<ul><li>i Subtract line 1f from line 1c. If zer</li><li>j If there is an amount other than ze</li></ul>	o or less, ente ero on either li s year? 4- that made a s	r -0- ne 1h or li Year Ave	raging Period Under 01(h) election do not h	Section 501(h) nave to complete all c	0.	
Subtract line 1f from line 1c. If zer     If there is an amount other than zer     reporting section 4911 tax for this	o or less, ente ero on either lii year? 4- that made a s See th	r -0- ne 1h or li Year Ave ection 50 ne separa	raging Period Under 01(h) election do not h ate instructions for lin	Section 501(h) nave to complete all c es 2a through 2f.)	0.	
Subtract line 1f from line 1c. If zer     If there is an amount other than zer     reporting section 4911 tax for this	o or less, ente ero on either lii year? 4- that made a s See th	r -0- ne 1h or li Year Ave ection 50 ne separa	raging Period Under 01(h) election do not h	Section 501(h) nave to complete all c es 2a through 2f.)	0.	
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t	o or less, ente ero on either lii s year? that made a s See th Lobbyin	Year Ave ection 50 ne separa	raging Period Under 01(h) election do not h ate instructions for lin nditures During 4-Yea	Section 501(h) nave to complete all c es 2a through 2f.) r Averaging Period	of the five columns be	low.
Subtract line 1f from line 1c. If zer     If there is an amount other than zer     reporting section 4911 tax for this      (Some organizations to the section is a section in the section in the section is a section in the section in the section in the section is a section in the sectio	o or less, ente ero on either lii year? 4- that made a s See th	Year Ave ection 50 ne separa	raging Period Under 01(h) election do not h ate instructions for lin	Section 501(h) nave to complete all c es 2a through 2f.)	0.	
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t	o or less, enter lines year?  4- that made a s See th  Lobbyin	Year Ave ection 50 ne separa ng Expen	raging Period Under 01(h) election do not hate instructions for lin 10ditures During 4-Yea (b) 2021	Section 501(h) have to complete all complete	of the five columns be	(e) Total
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t	o or less, enter lines year?  4- that made a s See th  Lobbyin	Year Ave ection 50 ne separa	raging Period Under 01(h) election do not h ate instructions for lin nditures During 4-Yea	Section 501(h) nave to complete all c es 2a through 2f.) r Averaging Period	of the five columns be	low.
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)	o or less, enter lines year?  4- that made a s See th  Lobbyin	Year Ave ection 50 ne separa ng Expen	raging Period Under 01(h) election do not hate instructions for lin 10ditures During 4-Yea (b) 2021	Section 501(h) have to complete all complete	of the five columns be	(e) Total
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount	o or less, enter lines year?  4- that made a s See th  Lobbyin	Year Ave ection 50 ne separa ng Expen	raging Period Under 01(h) election do not hate instructions for lin 10ditures During 4-Yea (b) 2021	Section 501(h) have to complete all complete	of the five columns be	(e) Total
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount b Lobbying ceiling amount (150% of line 2a, column(e))	o or less, enterero on either lines year?  4-that made a s See th Lobbyin  (a) 202	Year Ave ection 50 ne separang Expen	raging Period Under 01(h) election do not h ate instructions for lin aditures During 4-Yea (b) 2021 288,744.	Section 501(h) nave to complete all complete	0.  of the five columns be  (d) 2023  257,676.	(e) Total  1,133,935.  1,700,903.
i Subtract line 1f from line 1c. If zer j If there is an amount other than zer reporting section 4911 tax for this  (Some organizations to  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount b Lobbying ceiling amount	o or less, enterero on either lines year?  4-that made a s See th Lobbyin  (a) 202	Year Ave ection 50 ne separa ng Expen	raging Period Under 01(h) election do not hate instructions for lin 10ditures During 4-Yea (b) 2021	Section 501(h) have to complete all complete	of the five columns be	(e) Total
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount b Lobbying ceiling amount (150% of line 2a, column(e))  c Total lobbying expenditures	o or less, enter lines year?  4- that made a s See th  Lobbyin  (a) 202  271,	Year Ave ection 50 ne separang Expen	raging Period Under 01(h) election do not hate instructions for line inditures During 4-Yea (b) 2021  288,744.	Section 501(h) have to complete all complete	0.  of the five columns be  (d) 2023  257,676.	(e) Total  1,133,935.  1,700,903.  423,253.
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount b Lobbying ceiling amount (150% of line 2a, column(e))  c Total lobbying expenditures  d Grassroots nontaxable amount	o or less, enter lines year?  4- that made a s See th  Lobbyin  (a) 202  271,	Year Ave ection 50 ne separang Expen	raging Period Under 01(h) election do not h ate instructions for lin aditures During 4-Yea (b) 2021 288,744.	Section 501(h) nave to complete all complete	0.  of the five columns be  (d) 2023  257,676.	(e) Total  1,133,935.  1,700,903.  423,253.
i Subtract line 1f from line 1c. If zer j If there is an amount other than ze reporting section 4911 tax for this  (Some organizations t  Calendar year (or fiscal year beginning in)  2a Lobbying nontaxable amount b Lobbying ceiling amount (150% of line 2a, column(e))  c Total lobbying expenditures	o or less, enter lines year?  4- that made a s See th  Lobbyin  (a) 202  271,	Year Ave ection 50 ne separang Expen	raging Period Under 01(h) election do not hate instructions for line inditures During 4-Yea (b) 2021  288,744.	Section 501(h) have to complete all complete	0.  of the five columns be  (d) 2023  257,676.	(e) Total  1,133,935.  1,700,903.  423,253.

Schedule C (Form 990) 2023

f Grassroots lobbying expenditures

Schedule C (Form 990) 2023

ASSOCIATION

58-1342588 Page 3

# Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

<ul> <li>During the year, did the filing organization attempt to influence foreign, national, stalocal legislation, including any attempt to influence public opinion on a legislative mor referendum, through the use of: <ul> <li>Volunteers?</li> <li>Paid staff or management (include compensation in expenses reported on lines 1c. Media advertisements?</li> <li>Mailings to members, legislators, or the public?</li> <li>Publications, or published or broadcast statements?</li> <li>Grants to other organizations for lobbying purposes?</li> <li>Direct contact with legislators, their staffs, government officials, or a legislative bodhallies, demonstrations, seminars, conventions, speeches, lectures, or any similar mid Other activities?</li> <li>Total. Add lines 1c through 1i</li> </ul> </li> <li>Did the activities in line 1 cause the organization to not be described in section 501 bit "Yes," enter the amount of any tax incurred under section 4912 cit "Yes," enter the amount of any tax incurred by organization managers under sect diff the filing organization incurred a section 4912 tax, did it file Form 4720 for this yee</li> <li>Part III-A Complete if the organization is exempt under section 501 501(c)(6).</li> <li>Were substantially all (90% or more) dues received nondeductible by members?</li> <li>Did the organization make only in-house lobbying expenditures of \$2,000 or less?</li> </ul>	through 1i)?  through 1i)?  dy? means?  1(c)(3)?  tion 4912	Yes	No or sec	Amo	ount
local legislation, including any attempt to influence public opinion on a legislative mor referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1cc Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar of the interest of the activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under sect of If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yempart III-A  Complete if the organization is exempt under section 50 501(c)(6).	through 1i)?  through 1i)?  dy? means?  1(c)(3)?  tion 4912	n 501(c)(5)	or sec		
local legislation, including any attempt to influence public opinion on a legislative mor referendum, through the use of:  a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1ccc Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative body h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar not in the other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section defined in the filing organization incurred a section 4912 tax, did it file Form 4720 for this year till-A Complete if the organization is exempt under section 501 to 1(c)(6).	through 1i)?  through 1i)?  dy? means?  1(c)(3)?  tion 4912	n 501(c)(5)	or sec		
a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative bod h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filling organization incurred a section 4912 tax, did it file Form 4720 for this ye  Part III-A Complete if the organization is exempt under section 50 501(c)(6).	through 1i)?	n 501(c)(5)	or sec		
a Volunteers?  b Paid staff or management (include compensation in expenses reported on lines 1c c Media advertisements?  d Mailings to members, legislators, or the public?  e Publications, or published or broadcast statements?  f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative bod h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this ye  Part III-A Complete if the organization is exempt under section 501(c)(6).	through 1i)?	n 501(c)(5)	or sec		
b Paid staff or management (include compensation in expenses reported on lines 1cc   c  Media advertisements? d Mailings to members, legislators, or the public? e  Publications, or published or broadcast statements? f  Grants to other organizations for lobbying purposes? g  Direct contact with legislators, their staffs, government officials, or a legislative bod   h  Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r   i  Other activities? j  Total. Add lines 1c through 1i  2a  Did the activities in line 1 cause the organization to not be described in section 501   b  If "Yes," enter the amount of any tax incurred under section 4912   c  If "Yes," enter the amount of any tax incurred by organization managers under sect   d  If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yee   Part III-A   Complete if the organization is exempt under section 50   501(c)(6).	through 1i)?	n 501(c)(5)	or sec		
d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative bod h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r i Other activities? j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A Complete if the organization is exempt under section 501(c)(6).	dy? means? 1(c)(3)? tion 4912	n 501(c)(5)	or sec		
d Mailings to members, legislators, or the public? e Publications, or published or broadcast statements? f Grants to other organizations for lobbying purposes? g Direct contact with legislators, their staffs, government officials, or a legislative bod h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r i Other activities? j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A Complete if the organization is exempt under section 50 501(c)(6).	dy? means? 1(c)(3)? tion 4912	n 501(c)(5)	or sec		
f Grants to other organizations for lobbying purposes?  g Direct contact with legislators, their staffs, government officials, or a legislative bod h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar r i Other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 b If "Yes," enter the amount of any tax incurred under section 4912 c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A Complete if the organization is exempt under section 50 501(c)(6).	dy? means? 1(c)(3)? tion 4912	n 501(c)(5)	or sec		
g Direct contact with legislators, their staffs, government officials, or a legislative bodh Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar roother activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501 bit "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under secting If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A Complete if the organization is exempt under section 50 501(c)(6).	dy? means? 1(c)(3)? tion 4912	n 501(c)(5)	or sec		
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar not other activities?  j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under section If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A  Complete if the organization is exempt under section 50 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	means? 1(c)(3)? tion 4912	n 501(c)(5)	or sec		
j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under sect  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A  Complete if the organization is exempt under section 50  501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	1(c)(3)? tion 4912	n 501(c)(5)	or sec		
j Total. Add lines 1c through 1i  2a Did the activities in line 1 cause the organization to not be described in section 501  b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under sect  d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yeart III-A  Complete if the organization is exempt under section 50  501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	1(c)(3)? tion 4912	n 501(c)(5)	or sec		
<ul> <li>Did the activities in line 1 cause the organization to not be described in section 501</li> <li>If "Yes," enter the amount of any tax incurred under section 4912</li> <li>If "Yes," enter the amount of any tax incurred by organization managers under sected. If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year till-A</li> <li>Complete if the organization is exempt under section 50 501(c)(6).</li> <li>Were substantially all (90% or more) dues received nondeductible by members?</li> </ul>	1(c)(3)? tion 4912	n 501(c)(5)	or sec		
b If "Yes," enter the amount of any tax incurred under section 4912  c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this yes  Part III-A Complete if the organization is exempt under section 50  501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	tion 4912	n 501(c)(5)	or sec		
c If "Yes," enter the amount of any tax incurred by organization managers under sect d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this ye.  Part III-A Complete if the organization is exempt under section 50 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	tion 4912	n 501(c)(5)	or sec		
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year till-A Complete if the organization is exempt under section 50 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	ear?	n 501(c)(5)	or sec		
Complete if the organization is exempt under section 50 501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	ear? <b>)1(c)(4), sectio</b> i	n 501(c)(5)	or sec		
501(c)(6).  1 Were substantially all (90% or more) dues received nondeductible by members?	01(c)(4), sectioi 	n 501(c)(5)	or sec		
Were substantially all (90% or more) dues received nondeductible by members?			, 0. 000	tion	
				Yes	N
			1		
··· -· 9-··· ··· ··· ··· ··· ···					
3 Did the organization agree to carry over lobbying and political campaign activity exp			3		
answered "Yes."  1 Dues, assessments and similar amounts from members			1		
2 Section 162(e) nondeductible lobbying and political expenditures (do not include a					
expenses for which the section 527(f) tax was paid).					
a Current year			2a		
<b>b</b> Carryover from last year			2b		
c Total			2c		
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section	on 162(e) dues		. 3		
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what	portion of the exce	ess			
does the organization agree to carryover to the reasonable estimate of nondeductib	ble lobbying and po	olitical			
expenditures next year?			4		
5 Taxable amount of lobbying and political expenditures. See instructions	<u></u>		. 5		
Part IV Supplemental Information					

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

### **Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

2023
Open to Public Inspection

Name of the organization

NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION

Employer identification number 58-1342588

Par	t I Organizations Maintaining Donor Advised organization answered "Yes" on Form 990, Part IV, lin.		Similar Funds	or Accour	nts. Complete if the
	organization answered Tes Sitt Offi 550,1 art iv, iiii	(a) Donor advis	ed funds	<b>(b)</b> Fur	nds and other accounts
1	Total number at end of year				
2	Aggregate value of contributions to (during year)				
3	Aggregate value of grants from (during year)				
4	Aggregate value at end of year				
5	Did the organization inform all donors and donor advisors in v		eld in donor advis	ed funds	
	are the organization's property, subject to the organization's	~			Yes No
6	Did the organization inform all grantees, donors, and donor a				
	for charitable purposes and not for the benefit of the donor or				
	impermissible private benefit?				
Par	t II Conservation Easements. Complete if the org	ganization answered "Ye	es" on Form 990, F	Part IV, line 7	
1	Purpose(s) of conservation easements held by the organization	on (check all that apply)			
	Preservation of land for public use (for example, recreated	tion or education)	Preservation of	a historically	important land area
	Protection of natural habitat		Preservation of	a certified hi	storic structure
	Preservation of open space				
2	Complete lines 2a through 2d if the organization held a qualif	fied conservation contrib	oution in the form	of a conserva	
	day of the tax year.				Held at the End of the Tax Year
а	Total number of conservation easements			2a	
b	Total acreage restricted by conservation easements			2b	
С	Number of conservation easements on a certified historic stru	ucture included on line 2	2a	2c	
d	Number of conservation easements included on line 2c acqui				
	on a historic structure listed in the National Register				
3	Number of conservation easements modified, transferred, rele	eased, extinguished, or	terminated by the	organization	during the tax
	year				
4	Number of states where property subject to conservation eas				
5	Does the organization have a written policy regarding the per				
	violations, and enforcement of the conservation easements it				Yes No
6	Staff and volunteer hours devoted to monitoring, inspecting,	handling of violations, a	nd enforcing cons	ervation ease	ements during the year
_	<del></del>				
7	Amount of expenses incurred in monitoring, inspecting, hand	iling of violations, and e	nforcing conservat	tion easemen	its during the year
•	Door and a company time and a co		ftion 170/h	\(4\(\D\(;\	
8	Does each conservation easement reported on line 2d above				□ vaa □ Na
•	and section 170(h)(4)(B)(ii)?				Yes No
9	In Part XIII, describe how the organization reports conservation				
	balance sheet, and include, if applicable, the text of the footn	note to the organization	s financiai stateme	ents that desc	cribes the
Par	organization's accounting for conservation easements.  † III Organizations Maintaining Collections of	Art. Historical Tre	easures, or Ot	her Simila	r Assets.
	Complete if the organization answered "Yes" on Form	-	,		
1a	If the organization elected, as permitted under FASB ASC 95		venue statement a	nd balance sl	heet works
	of art, historical treasures, or other similar assets held for pub	•			
	service, provide in Part XIII the text of the footnote to its finan	•	•		•
b	If the organization elected, as permitted under FASB ASC 95				t works of
	art, historical treasures, or other similar assets held for public				
	provide the following amounts relating to these items.				
	(i) Revenue included on Form 990, Part VIII, line 1				\$
					\$
2	If the organization received or held works of art, historical treat			gain, provide	 e
	the following amounts required to be reported under FASB A			- •	
а	Revenue included on Form 990, Part VIII, line 1				\$
b	Assets included in Form 990, Part X				\$

NORTH CAROLINA SUSTAINABLE ENERGY 58-1342588 Page 2 ASSOCIATION Schedule D (Form 990) 2023 Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued) Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply). Public exhibition Loan or exchange program Scholarly research Other h Preservation for future generations Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII. During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? No Escrow and Custodial Arrangements Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or Part IV reported an amount on Form 990, Part X, line 21. 1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No If "Yes," explain the arrangement in Part XIII and complete the following table: Amount 10 c Beginning balance 1d Additions during the year Distributions during the year 1e Ending balance 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII Endowment Funds Complete if the organization answered "Yes" on Form 990, Part IV, line 10. (a) Current year (b) Prior year (c) Two years back (d) Three years back (e) Four years back **1a** Beginning of year balance Contributions Net investment earnings, gains, and losses Grants or scholarships ..... Other expenditures for facilities and programs Administrative expenses ..... End of year balance Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: Board designated or quasi-endowment Permanent endowment Term endowment The percentages on lines 2a, 2b, and 2c should equal 100%. 3a Are there endowment funds not in the possession of the organization that are held and administered for the Yes No organization by: (i) Unrelated organizations? 3a(i) (ii) Related organizations? 3a(ii) **b** If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? Describe in Part XIII the intended uses of the organization's endowment funds. Land, Buildings, and Equipment Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10. Description of property (a) Cost or other (b) Cost or other (c) Accumulated (d) Book value depreciation basis (investment) basis (other) 1a Land **b** Buildings 49,515. 49,515. Leasehold improvements .....

58,387.

123,185.

Schedule D (Form 990) 2023

3.843

550

54,544.

117,635.

e Other

**d** Equipment

Total. Add lines 1a through 1e. (Column (d) must equal Form 990. Part X. line 10c. column (B))

NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION 58-1342588 Page **3** Schedule D (Form 990) 2023 Part VII Investments - Other Securities Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12. (a) Description of security or category (including name of security) (b) Book value (c) Method of valuation: Cost or end-of-year market value (1) Financial derivatives (2) Closely held equity interests (3) Other (A) (B) (C) (D) (E) (F) (G) (H) Total. (Col. (b) must equal Form 990, Part X, line 12, col. (B)) Part VIII Investments - Program Related. Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13. (a) Description of investment (b) Book value (c) Method of valuation: Cost or end-of-year market value (1) (2) (3) (4) (5) (6)(7) (8) (9) Total. (Col. (b) must equal Form 990, Part X, line 13, col. (B)) Part IX Other Assets Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. (a) Description (b) Book value 148,494. RIGHT OF USE ASSET (2) (3) (4) (5) (6) (7) (8) (9) 148,494 Total. (Column (b) must equal Form 990, Part X, line 15, col. (B)) Other Liabilities Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. (a) Description of liability (b) Book value (1) Federal income taxes CURRENT LEASE LIABILITY 163,403 (3)(4)(5) (6)(7)(8)(9)

Total. (Column (b) must equal Form 990, Part X, line 25, col. (B)) Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII

163,403.

58-1342588 Page 4 ASSOCIATION Schedule D (Form 990) 2023 Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return Complete if the organization answered "Yes" on Form 990, Part IV, line 12a. 2,297,191. Total revenue, gains, and other support per audited financial statements 1 Amounts included on line 1 but not on Form 990, Part VIII, line 12: 2 Net unrealized gains (losses) on investments 2a Donated services and use of facilities 2b Recoveries of prior year grants 2c Other (Describe in Part XIII.) Add lines 2a through 2d 2e Subtract line 2e from line 1 Amounts included on Form 990, Part VIII, line 12, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b 4a Other (Describe in Part XIII.) c Add lines 4a and 4b 4c 2,297 Total revenue. Add lines 3 and 4c. (This must equal Form 990. Part I. line 12. 5 Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return Complete if the organization answered "Yes" on Form 990, Part IV, line 12a. 2,147,948. Total expenses and losses per audited financial statements 1 1 Amounts included on line 1 but not on Form 990, Part IX, line 25: a Donated services and use of facilities 2a Prior year adjustments 2b 2c Other losses Other (Describe in Part XIII.) 2d Add lines 2a through 2d 2e 2,147,948. Subtract line 2e from line 1 3 Amounts included on Form 990, Part IX, line 25, but not on line 1: a Investment expenses not included on Form 990, Part VIII, line 7b 4a Other (Describe in Part XIII.) c Add lines 4a and 4b 4c 2,147 Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I. line 18.) Part XIII Supplemental Information Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part X, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Schedule D (Form 990) 2023

**SCHEDULE 0** (Form 990)

Department of the Treasury

Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information. Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for the latest information.

Open to Public

OMB No. 1545-0047

Inspection

Name of the organization

NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION

**Employer identification number** 58-1342588

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: MODEL FOR OTHER STATES. TOGETHER WITH OUR MEMBERSHIP, NCSEA IS BLAZING THE PATH TOWARD THIS VISION, WHERE THE POSSIBILITIES AND BENEFITS FOR OUR STATE AND LOCAL ECONOMIES ARE ENDLESS, INCLUDING: AFFORDABILITY OF CLEAN ENERGY ACCESS BY ALL CONSUMERS TO CLEAN ENERGY JOB GROWTH THROUGH CLEAN ENERGY MARKET ACTIVITY AMOUNT OF CLEAN ENERGY CAPACITY DEPLOYED IN THE MARKET BY INDUSTRY CONSUMERS, UTILITIES AMOUNT OF ENERGY DEMAND REDUCED INCREASED BIPARTISAN SUPPORT FOR TRANSFORMING THE ENERGY SYSTEM DECLINING POLLUTION AND WASTE IMPROVED ENERGY EQUITY IMPROVED QUALITY OF LIFE AND BUSINESS CLIMATE FOR CLEAN ENERGY WITH EXPANDED ECONOMIC DEVELOPMENT AND LOCAL TAX BASE EXPANSION OUR GOAL IS TO CULTIVATE A ROBUST CLEAN ENERGY ECOSYSTEM THAT UNIFIES AND BENEFITS ALL OF ITS STAKEHOLDERS: CONSUMERS, BUSINESSES, THE CLEAN ENERGY INDUSTRY AND UTILITY ENERGY PROVIDERS. FORM 990, PART VI, SECTION A, LINE 6: MEMBERSHIP IS OPEN TO ANY PERSON OR ORGANIZATION WHICH AGREES TO PURPOSES

FORM 990, PART VI, SECTION A, LINE 7A:

OF THE ORGANIZATION AS OUTLINED IN THE ORGANIZATION'S BYLAWS.

Schedule O (Form 990) 2023	Page <b>2</b>
Name of the organization NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION	Employer identification number 58-1342588
ORGANIZATION MEMBERS MAY PARTICIPATE IN ELECTING MEMBERS O	F THE GOVERNING
BODY.	
FORM 990, PART VI, SECTION A, LINE 7B:	
AMENDMENTS TO THE ORGANIZATION'S BYLAWS MUST BE APPROVED B	Y A VOTE OF THE
MEMBERSHIP.	
FORM 990, PART VI, SECTION B, LINE 11B:	
THE FEDERAL FORM 990 IS PREPARED BY AN INDEPENDENT CPA FIR	M WITH THE
ASSISTANCE OF THE MANAGING DIRECTOR AND OFFICE ADMINISTRAT	OR. THE FEDERAL
FORM 990 IS REVIEWED AND APPROVED BY THE AUDIT COMMITTEE.	AFTER APPROVAL BY
THE AUDIT COMMITTEE, THE FORM 990 IS FILED WITH THE INTERN	AL REVENUE
SERVICE. AT THE NEXT BOARD MEETING, THE AUDIT COMMITTEE PR	ESENTS THE FORM
990 TO THE BOARD OF DIRECTORS FOR THE BOARD'S REVIEW.	
FORM 990, PART VI, SECTION B, LINE 12C:	
THE CONFLICT OF INTEREST POLICY IS UPDATED ANNUALLY BY EAC	H BOARD MEMBER,
BUT NOT DURING THEIR QUARTERLY BOARD MEETINGS.	
FORM 990, PART VI, SECTION B, LINE 15:	
THE EXECUTIVE DIRECTOR'S (ED) COMPENSATION DECISION IS HAN	DLED BY THE BOARD
OF DIRECTORS, UNDER THE DIRECTION OF THE CHAIRPERSON. THE	ED'S PERFORMANCE
IS REVIEWED AND TAKEN INTO CONSIDERATION AS PART OF THE CO	MPENSATION
DECISION ALONG WITH ADVANCED MARKET RESEARCH ON THE POSITI	ON.
FORM 990, PART VI, SECTION C, LINE 19:	
THE GOVERNING DOCUMENTS OF THE ASSOCIATION ARE AVAILABLE T	O THE GENERAL
PUBLIC BY CONTACTING THE ASSOCIATION AT THE FOLLOWING MAIL	ING ADDRESS.

Schedule O (Form 990) 2023	Page <b>2</b>
Name of the organization NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION	Employer identification number 58-1342588
NORTH CAROLINA SUSTAINABLE ENERGY ASSOCIATION	
4800 SIX FORKS RD, STE 300	
RALEIGH, NC 27609	