

**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

▶ **Attach to Form 990.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I General Information on Grants and Assistance**

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .  **Yes**  **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
<b>(1)</b> COUNCIL ON FOREIGN RELATIONS 58 EAST 68TH STREET NEW YORK, NY 10065	13-1628168	501 (C) (3)	68,000.				EDUCATION
<b>(2)</b> CENTER FOR DEMOCRACY & TECHNOLOGY 1401 K STREET NW, SUITE 200	52-1905358	501 (C) (3)	133,000.				EDUCATION
<b>(3)</b> MARKET INSTITUTE FOUNDATION 1059 MARSHALL POND RD BURKE, VA 22015	83-1893169	501 (C) (3)	50,000.				EDUCATION
<b>(4)</b> COMMONWEALTH FOUNDATION 225 STATE ST STE 302 HARRISBURG, PA 17101	23-2473845	501 (C) (3)	160,000.				EDUCATION
<b>(5)</b> CAPITAL PREPARATORY SCHOOLS INC 777 MAIN ST. BRIDGEPORT, CT 06604	43-4669846	501 (C) (3)	800,000.				EDUCATION
<b>(6)</b> CARDINAL INSTITUTE FOR WEST VIRGINIA POLICY PO BOX 11495 CHARLESTON, WV 25339	47-1932521	501 (C) (3)	21,000.				EDUCATION
<b>(7)</b> CENTER FOR A NEW AMERICAN SECURITY 1152 15TH STREET, NW SUITE 950	20-8084828	501 (C) (3)	50,000.				EDUCATION
<b>(8)</b> MACKINAC CENTER FOR PUBLIC POLICY PO BOX 568 140 W MAIN ST MIDLAND, MI 48640	38-2701547	501 (C) (3)	350,000.				EDUCATION
<b>(9)</b> CENTER FOR INTERNATIONAL POLICY 2000 M STREET NW SUITE 720	52-1446207	501 (C) (3)	73,800.				EDUCATION
<b>(10)</b> RECIDIVIZ INC 1635 PINE LANE PROVO, UT 84604	82-5181074	501 (C) (3)	1,520,525.				EDUCATION
<b>(11)</b> RAND CORPORATION PO BOX 2138 1776 MAIN ST	95-1958142	501 (C) (3)	555,000.				EDUCATION
<b>(12)</b> CHALKBEAT INC 1239 BROADWAY #703B NEW YORK, NY 10001	90-0915846	501 (C) (3)	24,000.				EDUCATION

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . ▶
- 3** Enter total number of other organizations listed in the line 1 table . . . . . ▶

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(1) TEL FOUNDATION (TRUTH, ENTERPRISE, LIBERTY) 2602 S SHINNERY OAK COURT	47-1391457	501 (C) (3)	878,530.				EDUCATION
(2) THE MEDIA PROJECT P.O. BOX 19599 IRVINE, CA 92623	83-0461425	501 (C) (3)	8,000.				EDUCATION
(3) BARRY GOLDWATER INSTITUTE FOR PUBLIC POLICY 500 E CORONADO RD PHOENIX, AZ 85004	86-0597661	501 (C) (3)	404,000.				EDUCATION
(4) ASSOCIATION OF AMERICAN EDUCATORS FOUNDATIO 25909 PALA PLACE SUITE 330	33-0623003	501 (C) (3)	300,000.				EDUCATION
(5) ATLANTIC COUNCIL 1030 15TH STREET, NW, 12TH FLOOR	52-0742294	501 (C) (3)	1,005,000				EDUCATION
(6) CARNEGIE ENDOWMENT FOR INTERNATIONAL PEACE 1779 MASSACHUSETTS AVENUE NW	13-0552040	501 (C) (3)	1,021,500.				EDUCATION
(7) GOODMAN INSTITUTE FOR PUBLIC POLICY RESEARC 6335 W. NORTHWEST HWY, #2111	47-2184178	501 (C) (3)	75,000.				EDUCATION
(8) INDEPENDENT WOMEN'S FORUM 1875 I STREET NW SUITE 500	54-1670627	501 (C) (3)	153,000.				EDUCATION
(9) THE JAMES MADISON INSTITUTE FOR PUBLIC POLI THE COLUMNS 100 NORTH DUVAL STREET	59-2811908	501 (C) (3)	80,000.				EDUCATION
(10) NEW AMERICA FOUNDATION 740 15TH STREET, NW SUITE 900	52-2096845	501 (C) (3)	45,000.				EDUCATION
(11) PHOENIX CENTER FOR ADVANCED LEGAL & ECONOMI 5335 WISCONSIN AVE NW STE 440	52-2079266	501 (C) (3)	120,000.				EDUCATION
(12) NACDL FOUNDATION FOR CRIMINAL JUSTICE 1660 L ST NW FL 12 WASHINGTON, DC 20036	52-2289169	501 (C) (3)	504,000.				EDUCATION

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶

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(1) COLLEGE UNBOUND 325 PUBLIC STREET PROVIDENCE, RI 02905	46-2470807	501 (C) (3)	7,442.				EDUCATION
(2) PROJECT ON GOVERNMENT OVERSIGHT 1100 G STREET, NW SUITE 500	52-1739443	501 (C) (3)	50,000.				EDUCATION
(3) AMERICAN HERITAGE SOCIETY 500 N WASHINGTON ST BOX 1488	45-3436634	501 (C) (3)	8,000.				EDUCATION
(4) URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024	52-0880375	501 (C) (3)	250,000.				EDUCATION
(5) MEDIATORS FOUNDATION INC 2525 ARAPAHOE AVE SUITE E-4 #509	04-3002588	501 (C) (3)	50,000.				EDUCATION
(6) FRIENDS COMMITTEE ON NATIONAL LEGISLATION E 245 SECOND ST NE WASHINGTON, DC 20002	52-1254489	501 (C) (3)	25,000.				EDUCATION
(7) FOREIGN POLICY FOR AMERICA 722 12TH ST NW SUITE 300	83-1512677	501 (C) (3)	18,520.				EDUCATION
(8) CENTER FOR CIVILIANS IN CONFLICT 1850 M STREET SUITE 350	75-3130860	501 (C) (3)	91,000.				EDUCATION
(9) BELLWETHER EDUCATION PARTNERS 1426 9TH STREET NW SUITE 200	26-1914515	501 (C) (3)	500,000.				EDUCATION
(10) NATIONAL CONSTITUTION CENTER 525 ARCH STREET PHILADELPHIA, PA 19106	23-2434447	501 (C) (3)	808,000.				EDUCATION
(11) PARTNERSHIP FOR A NEW AMERICAN ECONOMY RESE 909 THIRD AVENUE NEW YORK, NY 10022	32-0325450	501 (C) (3)	118,000.				EDUCATION
(12) HUDSON INSTITUTE 1015 15TH STREET, NW, 6TH FLOOR	13-1945157	501 (C) (3)	45,000.				EDUCATION

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(1) BADGER INSTITUTE 633 W. WISCONSIN AVENUE SUITE 330	39-1592727	501 (C) (3)	15,000.				EDUCATION
(2) THREAD, INC. P.O. BOX 1584 BALTIMORE, MD 21203	84-1700955	501 (C) (3)	12,000.				EDUCATION
(3) THE LAST MILE 717 MARKET STREET SUITE 100	46-2899930	501 (C) (3)	7,808.				EDUCATION
(4) ENGINE FOUNDATION, INC. 44 TEHAMA ST. SAN FRANCISCO, CA 94105	82-3475407	501 (C) (3)	265,000.				EDUCATION
(5) TECHFREEDOM #409 110 MARYLAND AVE NE	27-3567814	501 (C) (3)	235,000.				EDUCATION
(6) MANHATTAN INSTITUTE FOR POLICY RESEARCH 52 VANDERBILT AVE NEW YORK, NY 10017	13-2912529	501 (C) (3)	394,000.				EDUCATION
(7) ARIZONA CENTER FOR INVESTIGATIVE REPORTING PO BOX 3665 PHOENIX, AZ 85030-3665	46-1209940	501 (C) (3)	8,000.				EDUCATION
(8) WORLD RELIEF 7 E. BALTIMORE ST BALTIMORE, MD 21202	23-6393344	501 (C) (3)	150,000.				EDUCATION
(9) PROPERTY AND ENVIRONMENT RESEARCH CENTER 2048 ANALYSIS DR. STE. A BOZEMAN, MT 59718	81-0393444	501 (C) (3)	250,000.				EDUCATION
(10) REASON FOUNDATION 1747 CONNECTICUT AVE., NW	95-3298239	501 (C) (3)	1,258,000.				EDUCATION
(11) CENTER FOR EMPLOYMENT OPPORTUNITIES 50 BROADWAY SUITE 1604 NEW YORK, NY 10004	13-3843322	501 (C) (3)	50,000.				EDUCATION
(12) TURNAROUND FOR CHILDREN 25 WEST 45TH STREET 6TH FLOOR	06-1495529	501 (C) (3)	916,766.				EDUCATION

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(1) THE BUCKEYE INSTITUTE FOR PUBLIC POLICY SOL 88 E BROAD ST STE 1300	31-1278593	501 (C) (3)	212,000.				EDUCATION
(2) NATIONAL FOUNDATION FOR AMERICAN POLICY 2111 WILSON BLVD SUITE 700	20-0094633	501 (C) (3)	115,000.				EDUCATION
(3) BILL OF RIGHTS INSTITUTE 1310 NORTH COURTHOUSE ROAD SUITE 620	48-0891418	501 (C) (3)	1,500,000.				EDUCATION
(4) INSTITUTE FOR HUMANE STUDIES 3434 WASHINGTON BLVD. MS 1C5	94-1623852	501 (C) (3)	12,000.				EDUCATION
(5) PACIFIC RESEARCH INSTITUTE 101 MONTGOMERY ST, STE 1300	94-2528433	501 (C) (3)	150,000.				EDUCATION
(6) AMERICAN LEGISLATIVE EXCHANGE COUNCIL 2900 CRYSTAL DRIVE, 6TH FLOOR	52-0140979	501 (C) (3)	550,000.				EDUCATION
(7) YOUNG VOICES 1101 17TH ST NW WASHINGTON, DC 20036	81-2593815	501 (C) (3)	106,500.				EDUCATION
(8) AMERICAN ACTION FORUM 1747 PENNSYLVANIA AVE NW STE 5	27-0567765	501 (C) (3)	250,000.				EDUCATION
(9) NATIONAL TAXPAYERS UNION FOUNDATION 112 C STREET NW SUITE 650	52-1122683	501 (C) (3)	304,000.				EDUCATION
(10) STUDENTS FOR LIBERTY 2221 S. CLARK ST. 12TH FLOOR	94-3435899	501 (C) (3)	8,157.				EDUCATION
(11) CENTER FOR THE NATIONAL INTEREST 1025 CONNECTICUT AVE NW SUITE 1200	26-2117013	501 (C) (3)	450,000.				EDUCATION
(12) ONE STONE 1151 WEST MILLER STREET BOISE, ID 83702	26-3599715	501 (C) (3)	80,000.				EDUCATION

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<b>(1)</b> BIPARTISAN POLICY CENTER 1225 EYE STREET NW SUITE 1000	73-1628382	501(C)(3)	50,000.				EDUCATION
<b>(2)</b> FREE SPIRIT MEDIA 906 S HOMAN AVE 5TH FLOOR CHICAGO, IL 60624	36-4456215	501(C)(3)	8,000.				EDUCATION
<b>(3)</b> IDAHO FREEDOM FOUNDATION, INC 2404 BANK DRIVE, #314 BOISE, ID 83706	26-3783048	501(C)(3)	7,127.				EDUCATION
<b>(4)</b> TAXPAYERS PROTECTION ALLIANCE 1401 K STREET NW SUITE 502	81-2132166	501(C)(3)	30,000.				EDUCATION
<b>(5)</b> EDCHOICE INC 111 MONUMENT CIRCLE SUITE 2650	35-1978359	501(C)(3)	800,000.				EDUCATION
<b>(6)</b> NETWORK CONTAGION RESEARCH INSTITUTE 143 COOLIDGE AVE LAWRENCEVILLE, NJ 08468	82-3649399	501(C)(3)	25,000.				EDUCATION
<b>(7)</b> STORYCORPS, INC 80 HANSON PLACE 2ND FLOOR	13-3753011	501(C)(3)	300,000.				EDUCATION
<b>(8)</b> FOUNDATION FOR INDIVIDUAL RIGHTS IN EDUCATI 510 WALNUT STREET, SUITE 1250	04-3467254	501(C)(3)	1,405,000.				EDUCATION
<b>(9)</b> NCSL FOUNDATION FOR STATE LEGISLATURES 7700 E 1ST PL DENVER, CO 80230	74-2232576	501(C)(3)	30,000.				EDUCATION
<b>(10)</b> PRINCETON UNIVERSITY 244 CORWIN HALL PRINCETON, NJ 08544	21-0634501	501(C)(3)	250,000.				EDUCATION
<b>(11)</b> PELICAN INSTITUTE 400 POYDRAS ST FL 30 NEW ORLEANS, LA 70130	26-1704791	501(C)(3)	241,000.				EDUCATION
<b>(12)</b> SUMMIT PUBLIC SCHOOLS 780 BROADWAY ST REDWOOD CITY, CA 94063	26-2034843	501(C)(3)	1,640,000.				EDUCATION

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(1) R STREET INSTITUTE 1212 NEW YORK AVE. NW SUITE 900	26-3477125	501(C)(3)	491,000.				EDUCATION
(2) EMPOWERING CHURCH HEALTH OUTREACH 1350 CONCOURSE AVENUE SUITE 143 FLOOR 3	26-0531116	501(C)(3)	225,000.				EDUCATION
(3) PACIFIC LEGAL FOUNDATION 930 G STREET SACRAMENTO, CA 95814	94-2197343	501(C)(3)	1,021,205.				EDUCATION
(4) NEVADA NEWS BUREAU, INC 7455 ARROYO CROSSING PKWY #220	27-3192716	501(C)(3)	8,000.				EDUCATION
(5) CATO INSTITUTE 1000 MASSACHUSETTS AVE NW	23-7432162	501(C)(3)	2,163,000.				EDUCATION
(6) NATIONAL IMMIGRATION FORUM 50 F STREET SUITE 300 WASHINGTON, DC 20001	13-1776711	501(C)(3)	810,000.				EDUCATION
(7) ROCKEFELLER PHILANTHROPY ADVISORS INC 6 WEST 48TH STREET 10TH FLOOR	13-3615533	501(C)(3)	100,000.				EDUCATION
(8) DEFENSE PRIORITIES FOUNDATION 1 THOMAS CIRCLE NW WASHINGTON, DC 20005	81-0714113	501(C)(3)	45,000.				EDUCATION
(9) NORTHEASTERN UNIVERSITY 360 HUNTINGTON AVE BOSTON, MA 02115	04-1679980	501(C)(3)	8,000.				EDUCATION
(10) FRIENDS OF UFM 7741 PONCE DE LEON ROAD MIAMI, FL 33143	27-2852264	501(C)(3)	90,000.				EDUCATION
(11) THE PHOENIX 2239 CHAMPA STREET DENVER, CO 80205	20-4648043	501(C)(3)	27,379.				EDUCATION
(12) SOCIETY FOR HUMAN RESOURCE MANAGEMENT 1800 DUKE ST ALEXANDRIA, VA 22314	34-6610067	501(C)(3)	85,000.				EDUCATION

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1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) 50CAN 1625 K STREET NW, SUITE 400	27-3069592	501 (C) (3)	400,000.				EDUCATION
(2) INSTITUTE FOR POLICY INNOVATION 1320 GREENWAY DRIVE, SUITE 820	75-2158093	501 (C) (3)	30,000.				EDUCATION
(3) PETERSON INSTITUTE FOR INTERNATIONAL ECONOM 1750 MASSACHUSETTS AVE NW	52-1226967	501 (C) (3)	165,000.				EDUCATION
(4) WISCONSIN INSTITUTE FOR LAW AND LIBERTY 330 EAST KILBOURN AVENUE, SUITE 725	45-1606079	501 (C) (3)	200,000.				EDUCATION
(5) THE WHOLE TRUTH FUND 117 QUARRY ST UNIT 3 PHILADELPHIA, PA 19106	85-2104509	501 (C) (3)	7,500.				EDUCATION
(6) ON BEING PROJECT 1619 HENNEPIN AVE MINNEAPOLIS, MN 55403	46-2775553	501 (C) (3)	1,000,000.				EDUCATION
(7) FRONTIER INSTITUTE PO BOX 5104 HELENA, MT 59604	85-0998465	501 (C) (3)	40,000.				EDUCATION
(8) COUNCIL ON CRIMINAL JUSTICE 700 PENNSYLVANIA AVE SE	83-1925775	501 (C) (3)	600,000.				EDUCATION
(9) AMERICAN ENTERPRISE INSTITUTE 1789 MASSACHUSETTS AVENUE, NW	53-0218495	501 (C) (3)	500,000.				EDUCATION
(10) AMERICAN COUNCIL OF TRUSTEES AND ALUMNI 1726 M ST NW SUITE 600	52-1870003	501 (C) (3)	12,000.				EDUCATION
(11) NEW CIVIL LIBERTIES ALLIANCE 1225 19TH ST NW SUITE 450	81-3474290	501 (C) (3)	1,008,000.				EDUCATION
(12) THE KIND FOUNDATION PO BOX 705 MIDTOWN STATION	81-0856748	501 (C) (3)	150,000.				EDUCATION

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2020



**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) CENTER FOR STRATEGIC AND INTERNATIONAL STUD 1616 RHODE ISLAND AVENUE, NW	52-1501082	501 (C) (3)	144,300.				EDUCATION
(2) THE FAIRNESS CENTER P.O. BOX 1482 1675 CAMP HILL BYPASS	46-4482738	501 (C) (3)	250,000.				EDUCATION
(3) LIBERTAS INSTITUTE 2183 W MAIN ST SUITE A102 LEHI, UT 84043	45-5254794	501 (C) (3)	128,000.				EDUCATION
(4) FOSTER RUSSELL FAMILY FOUNDATION 3552 DIAMONDHEAD DR PLANO, TX 75057-1736	81-4065243	501 (C) (3)	80,000.				EDUCATION
(5) ALLIANCE DEFENDING FREEDOM 15100 N 90TH STREET SCOTTSDALE, AZ 85260	54-1660459	501 (C) (3)	275,000.				EDUCATION
(6) DUKE UNIVERSITY 81 BEVERLY DR DURHAM, NC 27707	56-0532129	501 (C) (3)	5,500.				EDUCATION
(7) MORE IN COMMON 115 BROADWAY ST. FLOOR 5 NEW YORK, NY 10006	82-3043917	501 (C) (3)	75,000.				EDUCATION
(8) PEGASUS INSTITUTE 235 S. 5TH STREET LOUISVILLE, KY 40202	81-3358989	501 (C) (3)	30,000.				EDUCATION
(9) THE HERITAGE FOUNDATION 214 MASSACHUSETTS AVENUE NE	23-7327730	501 (C) (3)	604,000.				EDUCATION
(10) TECHNOLOGY POLICY INSTITUTE 409 12TH STREET SW SUITE 700	20-5835776	501 (C) (3)	560,000.				EDUCATION
(11) HOPEWELL FUND 1201 CONNECTICUT AVE NW STE 300	47-3681860	501 (C) (3)	150,000.				EDUCATION
(12) ACTON ACADEMY FOUNDATION 2737 DEVONSHIRE PL. NW #425	47-4108671	501 (C) (3)	200,000.				EDUCATION

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2020

**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047

**2020**

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Name of the organization

CHARLES KOCH INSTITUTE

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**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) FUTURE OF STORYTELLING FOR GOOD INC 124 WEST 12TH ST NEW YORK, NY 10011	81-4296001	501 (C) (3)	300,000.				EDUCATION
(2) NATIONAL FREEDOM OF INFORMATION COALITION UNIVERSITY OF FLORIDA COLLEGE OF JOURNALISM	75-2508526	501 (C) (3)	130,000.				EDUCATION
(3) THE SIXTH AMENDMENT CENTER PO BOX 15556 BOSTON, MA 02215	45-3477185	501 (C) (3)	183,000.				EDUCATION
(4) INSTITUTE FOR FREE SPEECH 124 S WEST STREET SUITE 201	20-3676886	501 (C) (3)	250,000.				EDUCATION
(5) EURASIA GROUP 149 5TH AVENUE 15TH FLOOR	52-1780162	501 (C) (3)	450,000.				EDUCATION
(6) THE POYNTER INSTITUTE FOR MEDIA STUDIES, IN 801 THIRD STREET SOUTH	59-1630423	501 (C) (3)	624,000.				EDUCATION
(7) THE AMERICAN IDEAS INSTITUTE THE AMERICAN CONSERVATIVE 910 17TH STREET,	27-0311492	501 (C) (3)	538,400.				EDUCATION
(8) INFORMATION TECHNOLOGY AND INNOVATION FOUND 1250 EYE ST NW WASHINGTON, DC 20006-2626	20-4403497	501 (C) (3)	224,000.				EDUCATION
(9) TEXAS PUBLIC POLICY FOUNDATION 901 CONGRESS AVE AUSTIN, TX 78701	74-2524057	501 (C) (3)	1,278,000.				EDUCATION
(10) BEACON CENTER OF TENNESSEE THE BEACON CENTER OF TENNESSEE 1200 CLINTON	20-1808567	501 (C) (3)	178,000.				EDUCATION
(11) AMERICAN JURIS LINK 7000 N 16 ST SUITE 120-155	84-2191039	501 (C) (3)	200,000.				EDUCATION
(12) THE QUINCY INSTITUTE 11187 LONGWOOD GROVE DRIVE RESTON, VA 20194	84-2285143	501 (C) (3)	545,000.				EDUCATION

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2020

**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047

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Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I General Information on Grants and Assistance**

- Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
<b>(1)</b> NONZERO FOUNDATION 321 PROSPECT AVE PRINCETON, NJ 08540	45-4015017	501(C)(3)	35,000.				EDUCATION
<b>(2)</b> INTERNATIONAL CRISIS GROUP 1629 K ST STE 450 WASHINGTON, DC 20006	52-5170039	501(C)(3)	800,000.				EDUCATION
<b>(3)</b> COLLEGE BOUND DORCHESTER 275 EAST COTTAGE STREET	04-2383512	501(C)(3)	11,808.				EDUCATION
<b>(4)</b> AMERICA'S FUTURE FOUNDATION 1513 16TH STREET NW WASHINGTON, DC 20036	52-1928321	501(C)(3)	75,000.				EDUCATION
<b>(5)</b> EURASIA GROUP FOUNDATION 79 MADISON AVENUE NEW YORK, NY 10016	81-1614189	501(C)(3)	200,000.				EDUCATION
<b>(6)</b> THE GROUNDTRUTH PROJECT 10 GUEST ST BRIGHTON, MA 02135	46-0908502	501(C)(3)	16,000.				EDUCATION
<b>(7)</b> EDWARD CHARLES FOUNDATION 269 SOUTH BEVERLY DR STE 338	26-4245043	501(C)(3)	1,300,000.				EDUCATION
<b>(8)</b> ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 10158-3560	13-1818723	501(C)(3)	225,000.				EDUCATION
<b>(9)</b> ATLAS NETWORK 1201 I ST NW WASHINGTON, DC 20005	94-2763845	501(C)(3)	104,000.				EDUCATION
<b>(10)</b> INTERNATIONAL CENTER FOR LAW & ECONOMICS 2117 NE OREGON ST. STE. 501	52-2363626	501(C)(3)	705,000.				EDUCATION
<b>(11)</b> AMERICANS FOR PROSPERITY FOUNDATION 1310 N. COURTHOUSE RD. SUITE 700	52-1527294	501(C)(3)	12,000.				EDUCATION
<b>(12)</b> YOUNG AMERICANS FOR LIBERTY FOUNDATION THE RESERVE OFFICE PARK 500 N CAPITAL OF TE	45-3503672	501(C)(3)	340,000.				EDUCATION

- Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶
- Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2020

**SCHEDULE I  
(Form 990)**

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

OMB No. 1545-0047

**2020**

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Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) PRISON FELLOWSHIP MINISTRIES 44180 RIVERSIDE PARKWAY, #100	62-0988294	501 (C) (3)	8,000.				EDUCATION
(2) FOREIGN POLICY RESEARCH INSTITUTE 1528 WALNUT ST STE 610	23-1731998	501 (C) (3)	111,140.				EDUCATION
(3) AFTERSCHOOL ALLIANCE 1101 14TH ST., NW SUITE 700	52-2275123	501 (C) (3)	50,000.				EDUCATION
(4) MINERVA INSTITUTE FOR RESEARCH AND SCHOLARS 1145 MARKET ST, 9TH FLOOR	46-2589747	501 (C) (3)	1,225,000.				EDUCATION
(5) 4.0 SCHOOLS 612 ANDREW HIGGINS NEW ORLEANS, LA 70130	27-3474661	501 (C) (3)	1,250,000.				EDUCATION
(6) CENTER FOR GROWTH AND OPPORTUNITY 3525 OLD MAIN HILL LOGAN, UT 84322	45-3564310	501 (C) (3)	8,000.				EDUCATION
(7) WESTERN GOVERNORS UNIVERSITY ADVANCEMENT 4001 S 700 E SUITE 700	82-4547364	501 (C) (3)	250,000.				EDUCATION
(8) ASSOCIATION OF PROSECUTING ATTORNEYS 11 DUFONT CIRCLE NW SUITE 501	26-3117485	501 (C) (3)	140,000.				EDUCATION
(9) FEDERALIST SOCIETY 1776 I STREET NW, SUITE 300	36-3235550	501 (C) (3)	1,000,000.				EDUCATION
(10) COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1900 M STREET NW SUITE 850	52-1231278	501 (C) (3)	200,000.				EDUCATION
(11) ACTON INSTITUTE 98 E. FULTON STREET GRAND RAPIDS, MI 49503	38-2926822	501 (C) (3)	258,000.				EDUCATION
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 143.

3 Enter total number of other organizations listed in the line 1 table ▶

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

Schedule I (Form 990) 2020

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1 EDUCATIONAL PROGRAMS	111.	646,414.			
2					
3					
4					
5					
6					
7					

**Part IV Supplemental Information.** Provide the information required in Part I, line 2, Part III, column (b); and any other additional information.

SCHEDULE I, PART I, LINE 2

THE ORGANIZATION PROVIDED GRANTS TO THE ABOVE-MENTIONED ENTITIES TO  
 ENABLE INDIVIDUALS WORKING AT (AND SELECTED BY) THE GRANTEES TO ATTEND  
 THE ORGANIZATION'S CLASSROOM EDUCATIONAL PROGRAMS AS STUDENTS. THE GRANT  
 AWARD LETTERS PROHIBIT THE GRANTEE FROM USING THE GRANT FUNDS FOR  
 LOBBYING AND POLITICAL PURPOSES, AND MAY REQUIRE THE GRANTEE TO FURNISH A  
 REPORT TO THE ORGANIZATION DESCRIBING THE CHARITABLE AND EDUCATIONAL  
 ACTIVITIES IN CONNECTION WITH THE ORGANIZATION'S EDUCATIONAL PROGRAMS  
 FULFILLED BY THE USE OF GRANT FUNDS. ALL GRANTS WERE MADE PURSUANT TO THE  
 REQUIREMENT THAT THEY BE EXPENDED EXCLUSIVELY FOR 501(C) (3) PURPOSES. THE

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1					
2					
3					
4					
5					
6					
7					

**Part IV Supplemental Information.** Provide the information required in Part I, line 2, Part III, column (b); and any other additional information.

ORGANIZATION REVIEWS RECIPIENT'S FORM 990, IRS

TAX-EXEMPTION LETTER, AND VALIDATES THE RECIPIENT'S TAX ID NUMBER.

**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**2020**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

**3** Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |  |  |
|--|--|
| <input type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                     |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations     | <input type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? **4a**  **X**
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? **4b**  **X**
- c** Participate in or receive payment from an equity-based compensation arrangement? **4c**  **X**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? **5a**  **X**
- b** Any related organization? **5b**  **X**
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? **6a**  **X**
- b** Any related organization? **6b**  **X**
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III. **7**

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III. **8**  **X**

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? **9**

	Yes	No
<b>1a</b>		
<b>1b</b>		
<b>2</b>		
<b>3</b>		
<b>4a</b>		<b>X</b>
<b>4b</b>		<b>X</b>
<b>4c</b>		<b>X</b>
<b>5a</b>		<b>X</b>
<b>5b</b>		<b>X</b>
<b>6a</b>		<b>X</b>
<b>6b</b>		<b>X</b>
<b>7</b>	<b>X</b>	
<b>8</b>		<b>X</b>
<b>9</b>		

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

Schedule J (Form 990) 2020

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 LEA KROHN DIRECTOR, EDUCATION	(i)	131,079.	45,000.	0.	10,638.	5,020.	191,737.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
2 TIMOTHY MCCAUGHAN SR. MANAGER, MEDIA PROGRAMS	(i)	145,186.	25,000.	0.	10,500.	24,949.	205,635.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
3	(i)							
	(ii)							
4	(i)							
	(ii)							
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							



**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

SCHEDULE J, PART I, LINE 7

INCENTIVE COMPENSATION IS BASED ON EXTRAORDINARY EFFORTS AND SERVICES PROVIDED TO THE ORGANIZATION, NOT BASED ON FINANCIAL RESULTS OF THE INSTITUTE.

**SCHEDULE L**  
**(Form 990 or 990-EZ)**

**Transactions With Interested Persons**

OMB No. 1545-0047

**2020**

**Open To Public Inspection**

Department of the Treasury  
Internal Revenue Service

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

Name of the organization  
**CHARLES KOCH INSTITUTE**

Employer identification number  
**27-4967732**

**Part I Excess Benefit Transactions** (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only).  
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958 . . . . . ▶ \$ \_\_\_\_\_

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . . . ▶ \$ \_\_\_\_\_

**Part II Loans to and/or From Interested Persons.**  
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
			(1)									
(2)												
(3)												
(4)												
(5)												
(6)												
(7)												
(8)												
(9)												
(10)												
<b>Total</b> . . . . .						\$						

**Part III Grants or Assistance Benefiting Interested Persons.**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) SEE SCHEDULE L, PART V					
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					
(8)					
(9)					
(10)					

**Part V Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions).

SCHEDULE L, PART IV

LINE 1

A. ARCH PROPERTIES COMPANY

B. CHARLES G. KOCH IS A DIRECTOR OF CKI AND ARCH PROPERTIES COMPANY IS A 35% CONTROLLED ENTITY.

C. \$1,242,440

D. OFFICE SPACE RENTAL (AT COST), WHICH WAS REIMBURSED TO THE ORGANIZATION LATER IN THE YEAR.

E. NO

LINE 2

A. 1888 MANAGEMENT LLC

B. CHARLES G. KOCH IS A DIRECTOR OF CKI AND 1888 MANAGEMENT LLC IS A 35% CONTROLLED ENTITY.

C. \$66,687

D. INVESTMENT MANAGEMENT FEES

E. NO

**SCHEDULE O  
(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

Name of the organization

CHARLES KOCH INSTITUTE

**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 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

Employer identification number

27-4967732

FORM 990, PART I, LINE 1

ADVANCE THESE PRINCIPLES, CHALLENGE CONVENTION, AND ELIMINATE BARRIERS  
THAT STIFLE CREATIVITY AND PROGRESS.

FORM 990, PART III, LINE 1

INSPIRED BY A RECOGNITION THAT FREE PEOPLE ARE CAPABLE OF EXTRAORDINARY  
THINGS, THE CHARLES KOCH INSTITUTE SUPPORTS EDUCATIONAL PROGRAMS AND  
DIALOGUE TO ADVANCE THESE PRINCIPLES, CHALLENGE CONVENTION, AND ELIMINATE  
BARRIERS THAT STIFLE CREATIVITY AND PROGRESS.

FORM 990, PART III, LINE 2

DURING 2020, CKI EMBARKED UPON A NEW PROGRAM TO ADVANCE ITS  
501(C)(3)/170(B)(1)(A)(II) PURPOSES BY MAKING GRANTS TO OTHER 501(C)(3)  
ORGANIZATIONS. THIS PROGRAM INVOLVES INSUBSTANTIAL AMOUNTS OF  
ADMINISTRATIVE/PERSONNEL SUPPORT IN COMPARISON TO OTHER CKI PROGRAMS.

FORM 990, PART VI, SECTION A, LINE 2

CHARLES G. KOCH, ELIZABETH B. KOCH AND CHARLES CHASE KOCH HAVE A FAMILY  
RELATIONSHIP. VARIOUS OFFICERS AND DIRECTORS HAVE A BUSINESS  
RELATIONSHIP.

FORM 990, PART VI, SECTION A, LINE 4

DURING THE YEAR THE ORGANIZATION AMENDED THE BYLAWS TO CREATE A NEW  
MEMBERSHIP CLASS.

Name of the organization CHARLES KOCH INSTITUTE	Employer identification number 27-4967732
--	--

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

THE ORGANIZATION HAS ONE MEMBERSHIP CLASS. THE MEMBERSHIP CLASS CONSISTS OF ONE MEMBER, "CLASS A MEMBER".

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

THE "CLASS A MEMBER" HAS THE ABILITY TO APPOINT SUCCESSOR CLASS A MEMBERS, SERVE AS CHAIR OF THE BOARD OF DIRECTORS OR APPOINT CHAIR OF THE BOARD OF DIRECTORS, DETERMINE THE SIZE OF THE BOARD OF DIRECTORS, ELECT THE BOARD OF DIRECTORS, REMOVE THE BOARD OF DIRECTORS, AND APPROVE MAJOR TRANSACTIONS APPROVED BY THE BOARD.

FORM 990, PART VI, SECTION A, LINE 8B

THERE ARE NO SUCH COMMITTEES.

FORM 990, PART VI, SECTION B, LINE 11B

AN INDEPENDENT ACCOUNTING FIRM PREPARED AND REVIEWED THE FORM 990. A FULL DRAFT OF THE 990 ALONG WITH ALL REQUIRED SCHEDULES IS THEN PROVIDED TO INTERNAL MANAGEMENT AND LEGAL COUNSEL FOR REVIEW. ALL QUESTIONS ARE ADDRESSED AND ANY MODIFICATIONS ARE MADE, IF NECESSARY.

FORM 990, PART VI, SECTION B, LINE 12C

THE ORGANIZATION'S CONFLICT OF INTEREST POLICY COVERS PROPOSED TRANSACTIONS WHERE INTERESTED PERSONS (I.E., BOARD MEMBERS AND OFFICERS) MAY HAVE A FINANCIAL INTEREST IN A TRANSACTION BEING CONSIDERED BY THE BOARD OF DIRECTORS OR A COMMITTEE THEREOF. THE BOARD OR COMMITTEE THEREOF HAS VARIOUS OPTIONS TO ADDRESS THE PROPOSED TRANSACTION AND WHETHER IT PRESENTS A CONFLICT OF INTEREST, INCLUDING EVALUATING THE FAIRNESS OF THE

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

TRANSACTION, WHETHER TO APPOINT A DISINTERESTED PERSON(S) OR COMMITTEE TO  
EVALUATE THE TRANSACTION, CONSULTING LEGAL COUNSEL, ETC.

FORM 990, PART VI, SECTION C, LINE 19

THE ORGANIZATION MAKES ALL REQUIRED DISCLOSURES AVAILABLE TO THE PUBLIC  
UNDER IRS REGULATIONS.

FORM 990, PART XI, LINE 9

PARTNERSHIP INCOME

\$ (1,174,078)

ATTACHMENT 1990, PART VII- COMPENSATION OF THE FIVE HIGHEST PAID IND. CONTRACTORS

<u>NAME AND ADDRESS</u>	<u>DESCRIPTION OF SERVICES</u>	<u>COMPENSATION</u>
HEYFEIFER PRODUCTIONS 104 ST. MARKS PLACE, APT 3W BROOKLYN, NY 11217	ADVERTISING	249,000.
PESSIMISTS ARCHIVE LLC 104 ST. MARKS PLACE, APT 3W BROOKLYN, NY 11217	ADVERTISING	202,000.
THE ECONOMIST GROUP LTD 20 CABOT SQUARE, CANARY WHARF LONDON UNITED KINGDOM E144QW	CONSULTING	150,000.
NIKO CANNER DBA INCANDESCENT LLC 27 W 24TH SUITE 10E NEW YORK, NY 10010	CONSULTING	136,250.
EACH PLUS EVERY LLC 156 N WATER STREET KENT, OH 44240	MEDIA	115,700.

**SCHEDULE R  
(Form 990)**

**Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) CKI EVENTS LLC 1320 N COURTHOUSE RD STE 400 ARLINGTON, VA 22201 27-4967732	SCHOOL EVENTS	DE	0.	0.	CKI
(2) WEB MEDIA LLC 1320 N COURTHOUSE RD STE 400 ARLINGTON, VA 22201	WEB HOSTING	DE	0.	0.	CKI
(3)					
(4)					
(5)					
(6)					

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) CHARLES KOCH FOUNDATION 1320 N COURTHOUSE RD STE 400 ARLINGTON, VA 22201 48-0918408	GRANT MAKING	KS	501 (C) (3)	PF	CKI	X	
(2) STAND TOGETHER FOUNDATION 1320 N COURTHOUSE RD STE 220 ARLINGTON, VA 22201 27-3197768	PUBLIC CHARIT	DE	501 (C) (3)	7	CKI	X	
(3) STAND TOGETHER TRUST 1320 N COURTHOUSE RD STE 400 ARLINGTON, VA 22201 46-3508366	GRANT MAKING	DE	501 (C) (3)	7	CKI	X	
(4) TSN INSTITUTE, INC. 1320 N. COURTHOUSE RD STE 500 ARLINGTON, VA 22201 47-3175931	GRANT MAKING	DE	501 (C) (4)	N/A	TSNT	X	
(5) KNOWLEDGE AND PROGRESS FUND, INC. PO BOX 2256 WICHITA, KS 67201 54-1899251	GRANT MAKING	KS	501 (C) (3)	PF	TSNT	X	
(6) CAPITOL LEADERS, INC. 2200 WILSON BLVD STE 102-533 ARLINGTON, VA 22201 47-3438079	PUBLIC ED	DE	501 (C) (3)	7	STCC	X	
(7) CCKC4 INC. P.O. BOX 5004 WICHITA, KS 67201 83-3116152	GRANT MAKING	DE	501 (C) (4)		CKI	X	

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

Schedule R (Form 990) 2020

**SCHEDULE R  
(Form 990)**

**Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization

CHARLES KOCH INSTITUTE

Employer identification number

27-4967732

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1) CHARLES KOCH CHARITABLE FOUNDATION 1320 N COURTHOUSE RD STE 400 ARLINGTON, VA 22201 85-4058882	GRANT MAKING	DE	501 (C) (3)	PF	CKI	X	
(2) CHASE KOCH FOUNDATION, INC. P.O. BOX 5004 WICHITA, KS 57201 83-1697305	GRANT MAKING	DE	501 (C) (3)	PF	CKI	X	
(3)							
(4)							
(5)							
(6)							
(7)							

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

Schedule R (Form 990) 2020



**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512 - 514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V - UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) STVL3 LLC 85-2667830 1320 N COURTHOUSE RD STE 500 A	INVESTMENTS	DE	CKI	EXCLUDED	0.	459,471.		X	0.		X	30.0905
(2) NON-PROFIT 1888 FEEDER FUND, L P.O. BOX 5004 WICHITA, KS 6720	INVESTMENTS	KS	N/A	EXCLUDED	45,060,515.	512,155,304.		X	724,516.		X	21.0839
(3) EFPRP INVESTMENTS LLC 45-57790 4111 E 37TH STREET NORTH WICHI	INVESTMENTS	KS	CKF	EXCLUDED	7,159,767.	0.		X	-2,383,841.		X	34.3359
(4)												
(5)												
(6)												
(7)												

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) MBM CENTER, INC 81-4065996 1320 N COURTHOUSE RD STE 500 ARLINGTON, VA 22201	CONSULTING	DE	CKI	C CORP	235,758.	16,788,440.	100.0000	X	
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									

**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

	Yes	No
<b>1</b> During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?		
<b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity.		X
<b>b</b> Gift, grant, or capital contribution to related organization(s)	X	
<b>c</b> Gift, grant, or capital contribution from related organization(s)		X
<b>d</b> Loans or loan guarantees to or for related organization(s)		X
<b>e</b> Loans or loan guarantees by related organization(s)		X
<b>f</b> Dividends from related organization(s)		X
<b>g</b> Sale of assets to related organization(s)		X
<b>h</b> Purchase of assets from related organization(s)		X
<b>i</b> Exchange of assets with related organization(s)		X
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s)	X	
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s)		X
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s)	X	
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s)		X
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
<b>o</b> Sharing of paid employees with related organization(s)	X	
<b>p</b> Reimbursement paid to related organization(s) for expenses		X
<b>q</b> Reimbursement paid by related organization(s) for expenses	X	
<b>r</b> Other transfer of cash or property to related organization(s)		X
<b>s</b> Other transfer of cash or property from related organization(s)	X	

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) MBM CENTER	B	11,725,000.	CASH PAYMENTS
(2) STVL3 LLC	B	511,538.	CASH PAYMENTS
(3) NON-PROFIT 1888 FEEDER FUND LLC	B	34,657,533.	CASH PAYMENTS
(4) NON-PROFIT 1888 FEEDER FUND LLC	S	35,000,000.	CASH PAYMENTS
(5) EFPRP INVESTMENTS LLC	S	50,000,000.	CASH PAYMENTS
(6)			