

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**

Department of the Treasury
Internal Revenue Service

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

2024

Open to Public Inspection

A For the 2024 calendar year, or tax year beginning and ending																												
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td colspan="2">C Name of organization THE COMMUNITY FOUNDATION FOR Ocala Marion County Inc</td> <td rowspan="4">D Employer identification number 27-5098203</td> </tr> <tr> <td colspan="2">Doing business as</td> </tr> <tr> <td>Number and street (or P.O. box if mail is not delivered to street address)</td> <td>Room/suite</td> </tr> <tr> <td colspan="2">324 SE 24TH ST</td> </tr> <tr> <td colspan="2">City or town, state or province, country, and ZIP or foreign postal code OCALA, FL 34471-5362</td> <td>E Telephone number 352-622-5020</td> </tr> <tr> <td colspan="2">F Name and address of principal officer: LAUREN DEIORIO SAME AS C ABOVE</td> <td>G Gross receipts \$ 4,609,209.</td> </tr> <tr> <td colspan="2">I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527</td> <td>H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</td> </tr> <tr> <td colspan="2">J Website: WWW.OCALAFoundation.ORG</td> <td>H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No</td> </tr> <tr> <td colspan="2">K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other</td> <td>H(c) Group exemption number</td> </tr> <tr> <td colspan="2">L Year of formation: 2011</td> <td>M State of legal domicile: FL</td> </tr> </table>	C Name of organization THE COMMUNITY FOUNDATION FOR Ocala Marion County Inc		D Employer identification number 27-5098203	Doing business as		Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	324 SE 24TH ST		City or town, state or province, country, and ZIP or foreign postal code OCALA, FL 34471-5362		E Telephone number 352-622-5020	F Name and address of principal officer: LAUREN DEIORIO SAME AS C ABOVE		G Gross receipts \$ 4,609,209.	I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	J Website: WWW.OCALAFoundation.ORG		H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No	K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		H(c) Group exemption number	L Year of formation: 2011		M State of legal domicile: FL
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Part I Summary				
Activities & Governance	1 Briefly describe the organization's mission or most significant activities: CONNECTING THE CHARITABLE INTEREST OF THE DONOR TO BUILD A STRONGER COMMUNITY.			
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.			
	3 Number of voting members of the governing body (Part VI, line 1a)	3	17	
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	17	
	5 Total number of individuals employed in calendar year 2024 (Part V, line 2a)	5	12	
	6 Total number of volunteers (estimate if necessary)	6	19	
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.	
b Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.		
Revenue			Prior Year	Current Year
	8 Contributions and grants (Part VIII, line 1h)	3,522,045.	2,801,984.	
	9 Program service revenue (Part VIII, line 2g)	156,739.	242,534.	
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	119,687.	194,140.	
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-20,257.	-41,988.	
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,778,214.	3,196,670.	
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)		1,592,522.	2,520,673.
	14 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)		567,913.	601,587.
	16a Professional fundraising fees (Part IX, column (A), line 11e)		0.	0.
	b Total fundraising expenses (Part IX, column (D), line 25) 850.			
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		147,029.	193,954.
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		2,307,464.	3,316,214.
	19 Revenue less expenses. Subtract line 18 from line 12		1,470,750.	-119,544.
Net Assets or Fund Balances			Beginning of Current Year	End of Year
	20 Total assets (Part X, line 16)		6,894,883.	10,199,650.
	21 Total liabilities (Part X, line 26)		3,139,080.	4,106,868.
22 Net assets or fund balances. Subtract line 21 from line 20		3,755,803.	6,092,782.	

Part II Signature Block					
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.					
Sign Here	Signature of officer LAUREN DEIORIO, EXECUTIVE DIRECTOR				Date
	Type or print name and title				
Paid Preparer Use Only	Preparer's name CORINNE LAROCHE		Preparer's signature CORINNE LAROCHE		Date 11/12/25
	Firm's name JAMES MOORE & CO., P.L.		Firm's EIN 59-3204548		Check if self-employed <input type="checkbox"/> PTIN P01500189
	Firm's address 5931 NW 1ST PL GAINESVILLE, FL 32607-2063				Phone no. 352-378-1331

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒

- 1 Briefly describe the organization's mission:

SEE SCHEDULE O

- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?
- ☐
- Yes
- ☒
- No

If "Yes," describe these new services on Schedule O.

- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?
- ☐
- Yes
- ☒
- No

If "Yes," describe these changes on Schedule O.

- 4 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.

- 4a (Code:) (Expenses \$ 2,552,957. including grants of \$ 2,515,673.) (Revenue \$ 242,534.)
-
- FUND MANAGEMENT

A COMMUNITY FOUNDATION IS A TAX EXEMPT, NONPROFIT, PUBLICLY SUPPORTED ORGANIZATION THAT EMPOWERS DONORS TO STRENGTHEN THEIR COMMUNITY, ONE PASSION AT A TIME. THE COMMON MISSION OF EVERY COMMUNITY FOUNDATION IS TO ENHANCE THE QUALITY OF LIFE IN THE LOCAL AREA. THROUGH FUND MANAGEMENT, THE FOUNDATION HELPS TO ACHIEVE THIS. WHETHER IT IS THE CREATION OF A FUND FOR THE INDIVIDUAL LOOKING FOR A TAX DEDUCTION OR THE NONPROFIT AGENCY THAT IS BUILDING PERMANENT ENDOWMENT FUNDS OR EVEN PROVIDING SCHOLARSHIPS FOR STUDENTS, THE FOUNDATION SUPPORTS A VARIETY OF LOCAL NONPROFITS THROUGH GRANTS AND SPECIAL PROJECTS. SINCE THE FOUNDATION'S INCEPTION IN 2011, NONPROFITS HAVE RECEIVED GRANTS

- 4b (Code:) (Expenses \$ 496,601. including grants of \$ 5,000.) (Revenue \$)
-
- NONPROFIT RESOURCE CENTER

ESTABLISHED IN APRIL OF 2019, THE NONPROFIT RESOURCE CENTER OPENED AS A COLLABORATIVE AMONG THE FOUNDATION, MARION COUNTY GOVERNMENT, THE CITY OF OCALA, AND ADVENTHEALTH OCALA AND THE MARION COUNTY HOSPITAL DISTRICT TO HELP GROW AND SUSTAIN OUR NONPROFIT COMMUNITY. THE RESOURCE CENTER PROVIDES A VARIETY OF ASSISTANCE OPTIONS TO HELP OUR NONPROFITS BUILD CAPACITY AND BECOME SUSTAINABLE WHICH INCLUDES; BOARD DEVELOPMENT, COMMUNICATIONS, PR & MARKETING COUNSELING, VIDEO TRAINING SPONSORED BY COX COMMUNICATIONS, FINANCE & ACCOUNTING COUNSELING, GRANT SERVICES, PROFESSIONAL DEVELOPMENT COURSES IN PARTNERSHIP WITH ROLLINS COLLEGE CRUMMER GRADUATE SCHOOL OF BUSINESS, MINI TRAINING SEMINARS &

- 4c (Code:) (Expenses \$ 3,365. including grants of \$) (Revenue \$)
-
- ESTATE PLANNING COUNCIL

THE ESTATE PLANNING COUNCIL PROVIDES A SOURCE OF EDUCATIONAL INFORMATION, A FORUM FOR NETWORKING AMONG DISCIPLINARIANS WHO PRACTICE FACETS OF ESTATE PLANNING, AND PROMOTES INTERDISCIPLINARY COMMUNICATION AND COOPERATION. THE GOAL OF OUR PROFESSIONAL MEMBERS IS TO IMPROVE OUR KNOWLEDGE TO RENDER THE BEST PROFESSIONAL SERVICE TO THE PUBLIC. MEMBERSHIP IS OPEN TO THOSE INDIVIDUALS IN PROFESSIONS THAT DEAL WITH ESTATE PLANNING AND ITS RELATED ISSUES.

- 4d Other program services (Describe on Schedule O.)

(Expenses \$ 685. including grants of \$) (Revenue \$)

- 4e Total program service expenses 3,053,608.

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Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		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? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		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? <i>If "Yes," complete Schedule D, Part IV</i>	X	
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	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.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
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? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	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 Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>		X
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)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		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 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	

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Part IV Checklist of Required Schedules (continued)

	Yes	No
22 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? <i>If "Yes," complete Schedule I, Parts I and III</i>	22 X	
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? <i>If "Yes," complete Schedule J</i>	23	X
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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c 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? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
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? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
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% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 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? <i>If "Yes," complete Schedule L, Part III</i>	27	X
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 A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i>	29 X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
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)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	X
37 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? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? Note: All Form 990 filers are required to complete Schedule O	38 X	

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a 24	
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b 0	
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c X	

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Part V **Statements Regarding Other IRS Filings and Tax Compliance** (continued)

	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 12		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>		
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b 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).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a 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?		X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7 Organizations that may receive deductible contributions under section 170(c).		
a 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?	X	
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d If "Yes," indicate the number of Forms 8282 filed during the year 7d		
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8 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?		
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?		
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12 10a		
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities 10b		
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders 11a		
b 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?		
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b		
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.		
b 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 13b		
c Enter the amount of reserves on hand 13c		
14a Did the organization receive any payments for indoor tanning services during the tax year?		X
b If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>		
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.		X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		X
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.		

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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.

Check if Schedule O contains a response or note to any line in this Part VI ☒ **X**

Section 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 17		
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 17		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?	3		X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6 Did the organization have members or stockholders?	6		X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body?	8a	X	
b Each committee with authority to act on behalf of the governing body?	8b	X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O	9		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a 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 chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X	
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X	
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X	
13 Did the organization have a written whistleblower policy?	13	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 by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a The organization's CEO, Executive Director, or top management official	15a	X	
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 arrangement with a taxable entity during the year?	16a		X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **NONE**

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

19 Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial 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 books and records
LAUREN DEIORIO - 352-622-5020
324 SE 24TH ST, OCALA, FL 34471-5362

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

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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 nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) LAUREN DEIORIO EXECUTIVE DIRECTOR	40.00			X				115,825.	0.	3,475.
(2) BEN MARCIANO DIRECTOR UNTIL 2/28/24	1.00	X						0.	0.	0.
(3) CHESTER WEBER DIRECTOR	1.00	X						0.	0.	0.
(4) DAVID MIDGETT VICE CHAIRMAN	2.00	X		X				0.	0.	0.
(5) FRANK HENNESSEY CHAIRMAN	4.00	X		X				0.	0.	0.
(6) JAMES HILLEBRANDT DIRECTOR	1.00	X						0.	0.	0.
(7) JANE FONTAINE SECRETARY	2.00	X		X				0.	0.	0.
(8) JON KURTZ TREASURER	2.00	X		X				0.	0.	0.
(9) MICHAEL SIBONI DIRECTOR	1.00	X						0.	0.	0.
(10) ROBERT BATSEL DIRECTOR	1.00	X						0.	0.	0.
(11) RUSTY BRANSON DIRECTOR	1.00	X						0.	0.	0.
(12) STEVEN LEE DIRECTOR	1.00	X						0.	0.	0.
(13) THAD BOYD DIRECTOR	1.00	X						0.	0.	0.
(14) WILLIAM CHAMBERS VICE CHAIRMAN	2.00	X		X				0.	0.	0.
(15) ANGIE CLIFTON DIRECTOR UNTIL 5/31/24	1.00	X						0.	0.	0.
(16) ANGIE LEWIS DIRECTOR	1.00	X						0.	0.	0.
(17) KEN KIRKPATRICK DIRECTOR	1.00	X						0.	0.	0.

**THE COMMUNITY FOUNDATION FOR
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Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) THOMAS O'MARA DIRECTOR	1.00	X						0.	0.	0.
(19) ERIKA SKULA DIRECTOR	1.00	X						0.	0.	0.
(20) DOUGLAS CONE III DIRECTOR	1.00	X						0.	0.	0.
1b Subtotal								115,825.	0.	3,475.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								115,825.	0.	3,475.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 1

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

Form **990** (2024)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

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Part VIII Statement of Revenue

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b	39,550.				
	c Fundraising events	1c	175,402.				
	d Related organizations	1d					
	e Government grants (contributions)	1e	894,398.				
	f All other contributions, gifts, grants, and similar amounts not included above ...	1f	1,692,634.				
	g Noncash contributions included in lines 1a-1f	1g	\$ 67,608.				
	h Total. Add lines 1a-1f		2,801,984.				
	Program Service Revenue	2 a PROGRAM SERVICE INCOME	Business Code	900099	168,386.	168,386.	
b MANAGEMENT FEE REVENUE			900099	70,248.	70,248.		
c ADMINISTRATIVE FEE INCOME			900099	3,900.	3,900.		
d							
e							
f All other program service revenue							
g Total. Add lines 2a-2f			242,534.				
Other Revenue		3 Investment income (including dividends, interest, and other similar amounts)			102,205.		
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross rents	6a	(i) Real (ii) Personal				
	b Less: rental expenses ...	6b					
	c Rental income or (loss)	6c					
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	7a	(i) Securities (ii) Other	1,393,871.			
	b Less: cost or other basis and sales expenses	7b		1,301,936.			
	c Gain or (loss)	7c		91,935.			
	d Net gain or (loss)			91,935.			91,935.
	8 a Gross income from fundraising events (not including \$ 175,402. of contributions reported on line 1c). See Part IV, line 18	8a		63,476.			
	b Less: direct expenses	8b		110,578.			
	c Net income or (loss) from fundraising events			-47,102.			-47,102.
	9 a Gross income from gaming activities. See Part IV, line 19	9a		2,000.			
	b Less: direct expenses	9b		25.			
c Net income or (loss) from gaming activities			1,975.			1,975.	
10 a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11 a OTHER INCOME	Business Code	624100	3,139.			3,139.
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d		3,139.				
	12 Total revenue. See instructions		3,196,670.	242,534.	0.	152,152.	

**THE COMMUNITY FOUNDATION FOR
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Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,470,324.	2,470,324.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	50,349.	50,349.		
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, trustees, and key employees	119,300.	95,440.	23,860.	
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	417,177.	257,170.	160,007.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	10,686.	6,204.	4,482.	
9 Other employee benefits	12,796.	6,133.	6,663.	
10 Payroll taxes	41,628.	27,415.	14,213.	
11 Fees for services (nonemployees):				
a Management	28,636.	1,304.	27,332.	
b Legal				
c Accounting	35,237.	28,122.	7,115.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	32,152.	32,152.		
12 Advertising and promotion	8,358.	4,753.	3,605.	
13 Office expenses	26,012.	20,693.	5,319.	
14 Information technology	16,233.	13,076.	3,157.	
15 Royalties				
16 Occupancy	5,562.	4,424.	1,138.	
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	644.	644.		
23 Insurance	2,999.	2,308.	691.	
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 O.)				
a PROGRAM SERVICE EXPENSE	21,789.	21,789.		
b WORKSHOP EXPENSES	7,567.	7,567.		
c ADMIN SCHOLARSHIP EXPEN	3,600.		3,600.	
d DUES AND SUBSCRIPTIONS	2,275.	1,843.	432.	
e All other expenses	2,890.	1,898.	142.	850.
25 Total functional expenses. Add lines 1 through 24e	3,316,214.	3,053,608.	261,756.	850.
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 <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**THE COMMUNITY FOUNDATION FOR
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Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	259,831.	1	313,953.
	2 Savings and temporary cash investments	270,710.	2	272,536.
	3 Pledges and grants receivable, net		3	2,292,372.
	4 Accounts receivable, net	97,244.	4	34,345.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	413.	9	2,548.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	16,621.		
	b Less: accumulated depreciation	14,943.		
		2,323.	10c	1,678.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11	5,810,330.	13	6,826,092.
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11	454,032.	15	456,126.	
16 Total assets. Add lines 1 through 15 (must equal line 33)	6,894,883.	16	10,199,650.	
Liabilities	17 Accounts payable and accrued expenses	11,107.	17	18,195.
	18 Grants payable	92,549.	18	100,000.
	19 Deferred revenue	125,708.	19	91,038.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	2,909,716.	21	3,897,635.
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25	3,139,080.	26	4,106,868.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	3,755,803.	27	3,800,410.
	28 Net assets with donor restrictions		28	2,292,372.
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	3,755,803.	32	6,092,782.
	33 Total liabilities and net assets/fund balances	6,894,883.	33	10,199,650.

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Part 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	3,196,670.
2	Total expenses (must equal Part IX, column (A), line 25)	2	3,316,214.
3	Revenue less expenses. Subtract line 2 from line 1	3	-119,544.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	3,755,803.
5	Net unrealized gains (losses) on investments	5	164,151.
6	Donated services and use of facilities	6	2,292,372.
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	6,092,782.

Part XII Financial Statements and Reporting

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

- 1** Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? _____
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? _____
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:
☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- c** If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? _____
- b** If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____

	Yes	No
2a		X
2b	X	
2c	X	
3a	X	
3b	X	

Form 990 (2024)

Department of the Treasury
Internal Revenue Service

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

OMB No. 1545-0047

2024

Open to Public Inspection

Employer identification number
27-5098203

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ 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).**
- 4 ☐ 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: _____
- 5 ☐ 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).**
- 7 ☒ 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.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ 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 university: _____
- 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.
 - a ☐ **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.**
 - 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.**
 - 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.**
 - d ☐ **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.**
 - e ☐ 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.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s).

g. Provide the following information about the supported organization(s):						
(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

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

(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.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	4651611.	2823715.	2726472.	3522045.	2801984.	16525827.
2 Tax revenues levied for the organization'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	93,353.	93,353.	93,353.	93,353.	93,353.	466,765.
4 Total. Add lines 1 through 3	4744964.	2917068.	2819825.	3615398.	2895337.	16992592.
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)						1043277.
6 Public support. Subtract line 5 from line 4.						15949315.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4	4744964.	2917068.	2819825.	3615398.	2895337.	16992592.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	21,738.	29,786.	36,301.	66,720.	102,205.	256,750.
9 Net income from unrelated business activities, whether or not the business is regularly carried on			43,294.		1,975.	45,269.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	30,017.	63,578.			3,139.	96,734.
11 Total support. Add lines 7 through 10						17391345.
12 Gross receipts from related activities, etc. (see instructions)					12	566,319.

13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here

Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f))	14	91.71 %
15 Public support percentage from 2023 Schedule A, Part II, line 14	15	92.30 %

16a 33 1/3% support test - 2024. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization

b 33 1/3% support test - 2023. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization

17a 10% -facts-and-circumstances test - 2024. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization

b 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions

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

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(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 performed, 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 business under section 513						
4 Tax revenues levied for the organization'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						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
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) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(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 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.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2023 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2023 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2024. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b 33 1/3% support tests - 2023. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

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

	Yes	No
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.		
2 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")? If "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).		
b 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?		
6 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).		
8 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.		
b 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.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a 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		
c 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		

Section 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		

Section 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		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the 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 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 supported organizations played in this regard.		
3		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a 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.	Yes	No	
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. Answer lines 3a and 3b below.			
a 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 Part VI.			
3a			
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			

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions.
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section 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	

Section 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	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
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	

Section 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	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990) 2024

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**Section D - Distributions**

		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i>)	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 organization is responsive (<i>provide details in Part VI</i>). See instructions.	8
9	Distributable amount for 2024 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2024	(iii) Distributable Amount for 2024
1 Distributable amount for 2024 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2024 (reasonable cause required - <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2024			
a From 2019			
b From 2020			
c From 2021			
d From 2022			
e From 2023			
f Total of lines 3a through 3e			
g Applied to under distributions of prior years			
h Applied to 2024 distributable amount			
i Carryover from 2019 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2024 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2024 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2025. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2020			
b Excess from 2021			
c Excess from 2022			
d Excess from 2023			
e Excess from 2024			

Schedule A (Form 990) 2024

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Schedule A (Form 990) 2024

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Part VI

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.)

SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:

FEE INCOME

2020 AMOUNT: \$ 20,616.

2021 AMOUNT: \$ 63,578.

OTHER INCOME

2020 AMOUNT: \$ 9,401.

2024 AMOUNT: \$ 3,139.

**Schedule B
(Form 990)**

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

Name of the organization

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Employer identification number

27-5098203

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** 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

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during 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; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year \$

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 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 that it doesn't meet the filing 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) (Rev. 12-2024)

Name of organization

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Employer identification number

27-5098203

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 160,448.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 443,355.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 357,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4		\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5		\$ 125,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6		\$ 69,619.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Employer identification number

27-5098203

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7		\$ 200,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8		\$ 145,185.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9		\$ 140,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
10		\$ 167,300.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
11		\$ 62,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
12		\$ 240,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Employer identification number

27-5098203

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13		\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

27-5098203

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
1	386 SHARES OF FRANKLIN DYNA TECH	\$ 60 , 448 .	05 / 28 / 24
(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
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	

Name of organization

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

Employer identification number

27-5098203**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 Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

SCHEDULE D
(Form 990)

(Rev. December 2024)

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.

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization **THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

Employer identification number
27-5098203

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	54	83
2 Aggregate value of contributions to (during year)	1,619,278.	1,679,583.
3 Aggregate value of grants from (during year)	1,881,158.	981,393.
4 Aggregate value at end of year	3,668,900.	3,899,183.
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included on line 2a	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4 Number of states where property subject to conservation easement is located

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1

(ii) Assets included in Form 990, Part X

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1

b Assets included in Form 990, Part X

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

Schedule D (Form 990) (Rev. 12-2024)

THE COMMUNITY FOUNDATION FOR

Schedule D (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203 Page 2

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 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).

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 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? ☐ Yes ☒ No

Part IV Escrow and Custodial Arrangements Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or 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

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
1c Beginning balance	
1d Additions during the year	
1e Distributions during the year	
1f Ending balance	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☒ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☒

Part V 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	103,428.	90,946.	107,981.	100,683.	89,636.
b Contributions	269.	1,000.	216.		
c Net investment earnings, gains, and losses	10,034.	12,439.	-16,291.	6,253.	10,149.
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses	1,087.	957.	960.	1,045.	898.
g End of year balance	112,644.	103,428.	90,946.	107,981.	100,683.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment 100 %

b Permanent endowment _____ %

c 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 organization by:

(i) Unrelated organizations? ☐ Yes ☒ No

(ii) Related organizations? ☐ Yes ☒ No

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☒ No

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI 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 basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		2,721.	1,043.	1,678.
d Equipment		13,900.	13,900.	0.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B)).				1,678.

Schedule D (Form 990) (Rev. 12-2024)

THE COMMUNITY FOUNDATION FOR

Schedule D (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203 Page 3

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) MARKETABLE SECURITIES AND		
(2) SECURITIES HELD IN TRUST	6,826,092.	END-OF-YEAR MARKET VALUE
(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
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 15, col. (B))	

Part X Other Liabilities

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	

2. 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 ... ☒

Schedule D (Form 990) (Rev. 12-2024)

THE COMMUNITY FOUNDATION FOR

Schedule D (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203 Page 4

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.

1	Total revenue, gains, and other support per audited financial statements	1	3,538,543.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	164,151.
b	Donated services and use of facilities	2b	67,128.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	231,279.
3	Subtract line 2e from line 1	3	3,307,264.
4	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	
b	Other (Describe in Part XIII.)	4b	-110,594.
c	Add lines 4a and 4b	4c	-110,594.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	3,196,670.

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.

1	Total expenses and losses per audited financial statements	1	3,558,661.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	131,853.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	110,594.
e	Add lines 2a through 2d	2e	242,447.
3	Subtract line 2e from line 1	3	3,316,214.
4	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	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	3,316,214.

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 V, 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.

PART IV, LINE 2B:

THE FOUNDATION HOLDS INVESTMENTS FOR NONPROFITS IN THE LOCAL COMMUNITY AS PART OF ITS CORE MISSION.

A COMMUNITY FOUNDATION IS A TAX EXEMPT, NONPROFIT, PUBLICLY SUPPORTED ORGANIZATION THAT EMPOWERS DONORS TO STRENGTHEN THEIR COMMUNITY, ONE PASSION AT A TIME. THE COMMON MISSION OF EVERY COMMUNITY FOUNDATION IS TO ENHANCE THE QUALITY OF LIFE IN THE LOCAL AREA. THROUGH FUND MANAGEMENT, THE FOUNDATION HELPS TO ACHIEVE THIS. WHETHER IT IS THE CREATION OF A FUND FOR THE INDIVIDUAL LOOKING FOR A TAX DEDUCTION OR THE NONPROFIT AGENCY THAT IS BUILDING PERMANENT ENDOWMENT FUNDS OR EVEN PROVIDING SCHOLARSHIPS FOR STUDENTS, THE FOUNDATION SUPPORTS A VARIETY OF LOCAL NONPROFITS THROUGH GRANTS AND SPECIAL PROJECTS.

PART V, LINE 4:

IN SEPTEMBER 2019, THE BOARD OF DIRECTORS DESIGNATED \$50,000 OF NET ASSETS WITHOUT DONOR RESTRICTIONS AS A GENERAL ENDOWMENT FUND TO SUPPORT THE MISSION OF THE FOUNDATION. THE ENDOWMENT FUND IS DESIGNATED TO BE PERPETUAL WITH PRINCIPAL INTACT AND ONLY EARNINGS WILL BE DISTRIBUTED. USE OF THE FUND REQUIRES BOARD APPROVAL AND IS DESIGNATED FOR USE BY THE BOARD. AT DECEMBER 31, 2024 AND 2023, THE BOARD DESIGNATED ACCOUNT TOTALED \$112,644 AND \$103,428 RESPECTIVELY.

PART X, LINE 2:

THE FOUNDATION QUALIFIES AS A TAX-EXEMPT ORGANIZATION UNDER SECTION

Part XIII Supplemental Information (continued)

501(C)(3) OF THE INTERNAL REVENUE CODE AND, THEREFORE, HAS MADE NO PROVISION FOR FEDERAL INCOME TAXES. IN ADDITION, THE FOUNDATION QUALIFIES FOR THE CHARITABLE CONTRIBUTION DEDUCTION UNDER SECTION 509(A). MANAGEMENT OF THE FOUNDATION CONSIDERS THE LIKELIHOOD OF CHANGES BY TAXING AUTHORITIES IN ITS FILED INCOME TAX RETURNS AND RECOGNIZES A LIABILITY FOR OR DISCLOSES POTENTIAL SIGNIFICANT CHANGES THAT MANAGEMENT BELIEVES ARE MORE LIKELY THAN NOT TO OCCUR, INCLUDING CHANGES TO THE FOUNDATION'S STATUS AS A NOT-FOR-PROFIT ENTITY. MANAGEMENT BELIEVES THE FOUNDATION MET THE REQUIREMENTS TO MAINTAIN ITS TAX-EXEMPT STATUS AND HAS NOT IDENTIFIED ANY UNCERTAIN TAX POSITIONS SUBJECT TO THE UNRELATED BUSINESS INCOME TAX THAT REQUIRE RECOGNITION OR DISCLOSURE IN THE ACCOMPANYING FINANCIAL STATEMENTS. THE FOUNDATION'S INCOME TAX RETURNS FOR THE PAST THREE YEARS ARE SUBJECT TO EXAMINATION BY TAX AUTHORITIES, AND MAY CHANGE UPON EXAMINATION.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DIRECT FUNDRAISING EXPENSES REPORTED ON 990 PART VIII	-110,594.
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PART XII, LINE 2D - OTHER ADJUSTMENTS:

DIRECT FUNDRAISING EXPENSES REPORTED ON 990 PART VIII	110,594.
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SCHEDULE G
(Form 990)

(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities
Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
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

Name of the organization THE COMMUNITY FOUNDATION FOR OCALA MARION COUNTY INC
Employer identification number 27-5098203

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
a Mail solicitations
b Internet and email solicitations
c Phone solicitations
d In-person solicitations
e Solicitation of nongovernment grants
f Solicitation of government grants
g Special fundraising events
2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?
b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

Table with 6 main columns: (i) Name and address of individual or entity (fundraiser), (ii) Activity, (iii) Did fundraiser have custody or control of contributions?, (iv) Gross receipts from activity, (v) Amount paid to (or retained by) fundraiser listed in col. (i), (vi) Amount paid to (or retained by) organization. Includes a Total row at the bottom.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

THE COMMUNITY FOUNDATION FOR

Schedule G (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203 Page 2

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1 BACK TO SCHOOL (event type)	(b) Event #2 INSPIRE GALA (event type)	(c) Other events 2 (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	82,900.	75,738.	80,240.	238,878.
	2 Less: Contributions	82,900.	56,802.	35,700.	175,402.
	3 Gross income (line 1 minus line 2)		18,936.	44,540.	63,476.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs		2,914.	1,810.	4,724.
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses	35,722.	48,110.	22,022.	105,854.
	10 Direct expense summary. Add lines 4 through 9 in column (d)				110,578.
11 Net income summary. Subtract line 10 from line 3, column (d)					-47,102.

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
6 Volunteer labor		<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7 Direct expense summary. Add lines 2 through 5 in column (d)					
8 Net gaming income summary. Subtract line 7 from line 1, column (d)					

9 Enter the state(s) in which the organization conducts gaming activities: _____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: _____

THE COMMUNITY FOUNDATION FOR

Schedule G (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203 Page 3

- 11** Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12** Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13** Indicate the percentage of gaming activity conducted in:
- | | | |
|--------------------------------------|------------|---|
| a The organization's facility | 13a | % |
| b An outside facility | 13b | % |
- 14** Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name _____

Address _____

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No
- b** If "Yes," enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____
- c** If "Yes," enter the name and address of the third party:

Name _____

Address _____

16 Gaming manager information:

Name _____

Gaming manager compensation \$ _____

Description of services provided _____

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

- a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No
- b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$ _____

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Part IV	Supplemental Information <i>(continued)</i>
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**SCHEDULE I
(Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

**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.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization **THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

Employer identification number
27-5098203

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 noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
AMBLESIDE SCHOOLS INTERNATIONAL PO BOX 2976 FREDERICKSBURG, TX 78624	20-3315666	501(C)(3)	28,500.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
AMERICAN RED CROSS OF NORTH FLORIDA - 751 RIVERSIDE AVE. - JACKSONVILLE, FL 32204	53-0196605	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
BAKER STREET WESLEYAN CHURCH 640 BAKER STREET WISCONSIN RAPIDS, WI 54494	39-1453452	501(C)(3)	7,000.	0.			TO SUPPORT THE CHURCH MISSION
BOYS AND GIRLS CLUB OF MARION COUNTY, INC. - PO BOX 409 - Ocala, FL 34478	59-1172127	501(C)(3)	30,150.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
CATHOLIC CHARITIES OF CENTRAL FLORIDA INC - 1819 N. SEMORAN BLVD - ORLANDO, FL 32807	59-1214353	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
ESTELLA BYRD WHITMAN WELLNESS AND COMMUNITY RESOURCE CENTER INC. - 819 NW 7TH STREET - Ocala, FL 34475	27-1348572	501(C)(3)	33,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **56.**
- 3** Enter total number of other organizations listed in the line 1 table **1.**

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

Schedule I (Form 990) (Rev. 12-2024)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FELLOWSHIP OF CHRISTIAN ATHLETES 8701 LEEDS ROAD KANSAS CITY, MO 64129	44-0610626	501(C)(3)	42,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
FLORIDA INSTITUTE FOR HUMAN AND MACHINE COGNITION INC - 15 SE OSCEOLA AVE - Ocala, FL 34471	20-0760849	501(C)(3)	17,500.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
FRIENDS OF MARION COUNTY VETERANS PARK INC. - 3366 SE 54TH AVE - Ocala, FL 34480	84-5118790	501(C)(3)	70,500.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
GIRLS ON THE RISE 640 NW 68TH PLACE OCALA, FL 34475	87-1404012	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
GOOD NEWS CHURCH 5600 SE 24TH ST. OCALA, FL 34480	59-3109167	501(C)(3)	18,000.	0.			TO SUPPORT THE CHURCH MISSION
GOOD SHEPHERD PRESBYTERIAN CHURCH 151 SW 87TH PLACE OCALA, FL 34476	59-3203719	501(C)(3)	24,000.	0.			TO SUPPORT THE CHURCH MISSION
GRACE CHRISTIAN SCHOOL OF Ocala FLORIDA INC. - 4410 SE 3RD AVE - Ocala, FL 34480	20-0581148	501(C)(3)	7,500.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
HIS COMPASSION INC. 3947 N HWY 441 OCALA, FL 34475	47-2334771	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
HIS HOUSE FOR HER INC PO BOX 830455 OCALA, FL 34483	85-0683463	501(C)(3)	20,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HONORING THE FATHER MINISTRIES, INC - 1183 SE 57TH AVE. - OCALA, FL 34480	62-1663391	501(C)(3)	62,804.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
HORSES N HEROES OF MARION COUNTY INC. - 12680 N US HWY 441 - CITRA, FL 32113	31-1548627	501(C)(3)	8,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
INSTITUTE FOR JUSTICE 901 N. GLEBE RD., SUITE 900 ARLINGTON, VA 22203	52-1744337	501(C)(3)	8,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
INTERFAITH EMERGENCY SERVICES INC. 435 NW 2ND STREET OCALA, FL 34475	59-2349840	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
KENNYS PLACE OF MARION COUNTY INC. 2603 SE 17TH STREET, SUITE A OCALA, FL 34471	59-3563675	501(C)(3)	25,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
KUT DIFFERENT INC. 640 NW 68TH PLACE OCALA, FL 34475	85-0658047	501(C)(3)	13,500.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
MARION COUNTY SEXUAL ASSAULT CENTER - 1121 SW 1ST AVE - OCALA, FL 34471	93-4001138	501(C)(3)	26,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
MARION CULTURAL ALLIANCE, INC. 23 SW BROADWAY ST. OCALA, FL 34471	31-1760490	501(C)(3)	9,300.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
MARION THERAPEUTIC RIDING ASSOCIATION INC. - 6850 SE 41ST COURT - OCALA, FL 34480	59-2822032	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

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MONASTIC FAITH HEALING MINISTRIES PRIORY #180 - 3391 E SILVER SPRINGS BLVD, STE B - OCALA, FL 34470		508(C)(1)(A)	229,747.	0.			TO SUPPORT THE CHURCH MISSION
NATIONAL ALLIANCE ON MENTAL ILLNESS OF MARION COUNTY INC - PO BOX 5753 - OCALA, FL 34478	59-3509499	501(C)(3)	35,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
ACT IV OCALA CIVIC THEATRE INC. 4337 E SILVER SPRINGS BLVD OCALA, FL 34470	59-2932322	501(C)(3)	22,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
ORA CLUBHOUSE INC. 2945 NE 3RD STREET, SUITE 205-212 OCALA, FL 34470	92-1760128	501(C)(3)	15,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
PERPETUAL CARE INC. 1200 NW 73RD TER OCALA, FL 34482	46-0502051	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
PUBLIC EDUCATION FOUNDATION OF MARION COUNTY INC. - 1239 NW 4TH ST - OCALA, FL 34475	59-2949915	501(C)(3)	20,250.	0.			TO SUPPORT THE FOUNDATION'S MISSION
REILLY ARTS CENTER 500 NE 9TH STREET OCALA, FL 34470	47-3433318	501(C)(3)	62,750.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
AMERICAS SECOND HARVEST OF THE BIG BEND INC. - 4446 ENTERPOT BLVD - TALLAHASSEE, FL 32310	59-2610345	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
SHEPHERDS LIGHTHOUSE INC. 5930 SE ROBINSON RD BELLEVIEW, FL 34420	48-1288332	501(C)(3)	10,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SOUTH POINT CHURCH 3401 SE LAKE WEIR AVE OCALA, FL 34471		501(C)(3)	6,000.	0.			TO SUPPORT THE CHURCH MISSION
ST PAUL CENTER FOR BIBLICAL THEOLOGY - 1468 PARKVIEW CIRCLE - STEUBENVILLE, OH 43952	75-2980638	501(C)(3)	62,000.	0.			TO SUPPORT THE CHURCH MISSION
ST. JOHN LUTERAN CHURCH AND SCHOOL OF OCALA FOUNDATION, INC. - 230 NE 25TH AVE., SUITE 100 - OCALA, FL 34470	45-3086987	501(C)(3)	50,000.	0.			TO SUPPORT THE CHURCH MISSION
MARION COUNTY FOSTER PARENT ASSOCIATION INC D.B.A THE FOSTERING FOUNDATION - 806 SE 11TH ST - OCALA, FL 34471	38-3796080	501(C)(3)	7,000.	0.			TO SUPPORT THE FOUNDATION'S MISSION
MARION COUNTY CHILDRENS ADVOCACY CENTER INC D.B.A KIMBERLY'S CENTER FOR CHILD PR - 2800 NE 14TH ST - OCALA, FL 34470	59-3575631	501(C)(3)	78,300.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
THE NAVIGATORS 3820 N 30TH ST COLORADO SPRINGS, CO 80904	84-6007896	501(C)(3)	5,400.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
THE PROJECT STABLE FOUNDATION INC. 23388 NW 27TH STREET MORRISTON, FL 32668	65-0551042	501(C)(3)	26,500.	0.			TO SUPPORT THE FOUNDATION'S MISSION
UMD NEWMAN CATHOLIC CAMPUS MINISTRY - 2380 E 4TH ST - DULUTH, MN 55812	61-2107830	501(C)(3)	10,000.	0.			TO SUPPORT THE CHURCH MISSION
UNITED WAY OF MARION COUNTY INC. 1401 NE 2ND STREET OCALA, FL 34470	59-0946642	501(C)(3)	35,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
VOICES OF CHANGE ANIMAL LEAGUE DBA VOCAL - 6393 SW 52ND ST - OCALA, FL 34474	47-3165668	501(C)(3)	18,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
WEAR GLOVES INC. 98 NE 9TH ST OCALA, FL 34470	27-3644705	501(C)(3)	9,000.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
WEST CHESTER UNIVERSITY FOUNDATION 202 CARTER DRIVE WEST CHESTER , PA 19382	23-3054174	501(C)(3)	25,000.	0.			TO SUPPORT THE FOUNDATION'S MISSION
XTREME SOULUTIONS, INC. P.O. BOX 5487 OCALA, FL 34478	30-0293324	501(C)(3)	44,162.	0.			TO SUPPORT THE ORGANIZATION'S MISSION
ESTELLA BYRD WHITMAN WELLNESS AND COMMUNITY RESOURCE CENTER INC. - 819 NW 7TH STREET - OCALA, FL 34475	27-1348572	501(C)(3)	43,355.	0.			IN ACCORDANCE WITH FEMA PUBLIC ASSISTANCE FUNDING
ESTELLA BYRD WHITMAN WELLNESS AND COMMUNITY RESOURCE CENTER INC. - 819 NW 7TH STREET - OCALA, FL 34475	27-1348572	501(C)(3)	16,645.	0.			IN ACCORDANCE WITH ARPA FUNDING
FLORIDA CENTER FOR THE BLIND INC. 1411 NE 22ND AVENUE OCALA, FL 34470	59-2953392	501(C)(3)	73,381.	0.			IN ACCORDANCE WITH ARPA FUNDING
INTERFAITH EMERGENCY SERVICES INC. 435 NW 2ND STREET OCALA, FL 34475	59-2349840	501(C)(3)	86,386.	0.			IN ACCORDANCE WITH ARPA FUNDING
EMPOWERED OF CENTRAL FLORIDA 1111 NE 25TH AVE, SUITE 103 OCALA, FL 34470	86-2847536	501(C)(3)	87,588.	0.			IN ACCORDANCE WITH ARPA FUNDING

Schedule I (Form 990)

**THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC**

27-5098203

Part II Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ARNETTE HOUSE, INC. PO BOX 1544 OCALA, FL 34478	59-2119445	501(C)(3)	35,000.	0.			IN ACCORDANCE WITH ARPA FUNDING
EMPOWERED OF CENTRAL FLORIDA 1111 NE 25TH AVE. , SUITE 103 OCALA, FL 34470	86-2847536	501(C)(3)	134,000.	0.			IN ACCORDANCE WITH ARPA FUNDING
MARION COUNTY CHILDREN'S ALLIANCE INC - 3482 NW 10TH ST - Ocala, FL 34475	06-1712493	501(C)(3)	25,000.	0.			IN ACCORDANCE WITH ARPA FUNDING
MARION COUNTY VETERANS COUNCIL INC 2730 E SILVER SPRINGS BLVD. 100 OCALA, FL 34470	59-1878048	501(C)(3)	16,000.	0.			IN ACCORDANCE WITH ARPA FUNDING
WINGS OF FAITH FELLOWSHIP CHURCH OF GOD - 5066 SE 64TH AVE RD - OCALA, FL 34472	59-3044032	501(C)(3)	101,000.	0.			IN ACCORDANCE WITH ARPA FUNDING
AMERICAN ENDOWMENT FOUNDATION 5700 DARROW RD HUDSON, OH 44236	34-1747398	501(C)(3)	268,995.	0.			TRANSFER OF DAF FUNDS TO ANOTHER DAF

Schedule I (Form 990)

THE COMMUNITY FOUNDATION FOR

Schedule I (Form 990) (Rev. 12-2024) OCALA MARION COUNTY INC

27-5098203

Page 2

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 noncash assistance
SCHOLARSHIPS	25	50,349.	0.		

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

PART I, LINE 2:

THE ORGANIZATION DETERMINES ELIGIBILITY FOR GRANTS TO NONPROFITS BY VERIFYING THE STATUS OF THE NONPROFITS THROUGH THE IRS TAX EXEMPT ORGANIZATION SEARCH. GRANTS THAT ARE MADE TO NONPROFITS ARE USUALLY UNRESTRICTED IN NATURE. FOR THOSE THAT THE DONOR RESTRICTS THEIR GRANT TO A SPECIFIC PROGRAM, THE ORGANIZATION MAKES CONTACT WITH THE CEO WITHIN THE YEAR TO VERIFY THE FUNDING WAS UTILIZED AS THE DONOR EXPECTED.

THE ORGANIZATION USES AN APPLICATION PROCESS FOR SCHOLARSHIP RECIPIENTS WHERE ALL APPLICANTS ARE REVIEWED BY A COMMITTEE AND SELECTED BASED ON THE ELIGIBILITY REQUIREMENTS. FOR SCHOLARSHIPS, MOST OF THE SCHOLARSHIPS GIVEN ARE UNRESTRICTED IN NATURE. THUS, ONCE THE AWARD IS GIVEN TO THE AWARDEE, THE FUNDS ARE NOT RESTRICTED TO A SPECIFIC USE.

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.
Attach to Form 990.

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

OMB No. 1545-0047

2024

Open to Public
Inspection

Name of the organization THE COMMUNITY FOUNDATION FOR
OCALA MARION COUNTY INC

Employer identification number
27-5098203

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	1	60,448.	FMV
10 Securities - Closely held stock				
11 Securities - Partnership, LLC, or trust interests				
12 Securities - Miscellaneous				
13 Qualified conservation contribution - Historic structures				
14 Qualified conservation contribution - Other ...				
15 Real estate - Residential				
16 Real estate - Commercial				
17 Real estate - Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other (CHAIRS)	X	1	7,160.	FMV
26 Other ()				
27 Other ()				
28 Other ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions
for which the organization completed Form 8283, Part V, Donee Acknowledgement 29 0

	Yes	No
30a During the year, did the organization receive by contribution any property reported on Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?		X
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

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

Schedule M (Form 990) 2024

Part II **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

SCHEDULE M, PART I, COLUMN (B):

THE ORGANIZATION IS REPORTING THE NUMBER OF CONTRIBUTIONS.

**SCHEDULE O
(Form 990)**

(Rev. December 2024)

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 instructions and the latest information.

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization THE COMMUNITY FOUNDATION FOR OCALA MARION COUNTY INC	Employer identification number 27-5098203
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FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
OUR MISSION AT THE COMMUNITY FOUNDATION FOR OCALA/MARION COUNTY IS TO
ENHANCE THE QUALITY OF LIFE FOR ALL RESIDENTS OF OUR COMMUNITY BY
FOSTERING PHILANTHROPY AND STEWARDING CHARITABLE RESOURCES. WE STRIVE
TO IDENTIFY AND ADDRESS THE MOST PRESSING NEEDS IN OUR AREA, AND TO
SUPPORT INNOVATIVE SOLUTIONS THAT CREATE POSITIVE, SUSTAINABLE CHANGE.
THROUGH PARTNERSHIPS WITH DONORS, NONPROFITS, AND OTHER COMMUNITY
LEADERS, WE SEEK TO BUILD A THRIVING, INCLUSIVE, AND RESILIENT
COMMUNITY THAT PROVIDES OPPORTUNITIES FOR ALL TO SUCCEED.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:
TOTALING \$9.9 MILLION. AT THE END OF 2024, THE FOUNDATION WAS MANAGING
59 AGENCY FUNDS, 17 ENDOWMENT FUNDS, 42 DONOR ADVISED FUNDS, 7
CORPORATE ADVISED FUND, 3 SCHOLARSHIP FUNDS, 1 ANNUITY FUND & 7 PASS
THROUGH FUND. RESULTING IN 15% INCREASE OF FUNDS UNDER MANAGEMENT FROM
THE PRIOR YEAR.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:
STRATEGIC & SUSTAINABILITY PLANNING. ALL RESOURCES FOLLOW THE
FOUNDATION'S ROADMAP TO SUCCESS WHICH IS A COMPILATION OF STANDARDS
DESIGNED TO ENSURE EACH NONPROFIT OPERATES LIKE THE BUSINESS IT IS.
SOME OF THE KEY AREAS IN THE ROADMAP ARE; EFFECTIVE GOVERNANCE, HUMAN
RESOURCES, FINANCIAL MANAGEMENT, AND MORE.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
NONPROFIT BUSINESS COUNCIL

THE NONPROFIT BUSINESS COUNCIL (NPBC) WAS FORMED 14 YEARS AGO AS A PART
OF THE CHAMBER OF COMMERCE. IN 2016, UNDER PREVIOUS LEADERSHIP, THE
COMMUNITY FOUNDATION BEGAN OVERSEEING THE COUNCIL'S OPERATIONS, AND IT
HAS CONTINUED TO SIGNIFICANTLY EXPAND SINCE THAT TIME. THE NPBC
PROMOTES THE ECONOMIC IMPACT OF NONPROFITS, STRENGTHENS THEIR CAPACITY
IN AREAS OF LEADERSHIP FUNDRAISING, BOARD DEVELOPMENT, STAFF
DEVELOPMENT AND COMPLIANCE, AND PROVIDES FOR MUCH-NEEDED COLLABORATION
AND PHILANTHROPIC EDUCATION. CURRENTLY THE COUNCIL MEMBERSHIP IS MADE
UP OF OVER 180 NONPROFITS GOVERNED BY A STEERING COMMITTEE OF NONPROFIT
LEADERS REPRESENTING SEVERAL DIFFERENT NONPROFIT SECTORS. THE NPBC HAS
THEIR OWN PROGRAMMING RUN BY THE COMMUNITY FOUNDATION WHICH INCLUDES:
GUIDE TO CHARITABLE GIVING, MONTHLY PROFESSIONAL DEVELOPMENT MEETINGS,
& YOUTH PHILANTHROPY IN ACTION (YPIA).
EXPENSES \$ 685. INCLUDING GRANTS OF \$ 0. REVENUE \$ 0.

FORM 990, PART VI, SECTION A, LINE 1A:
AN EXECUTIVE COMMITTEE, TO CONSIST OF FIVE (5) OR MORE DIRECTORS, WHICH
SHALL HAVE AND MAY EXERCISE ALL POWERS AND AUTHORITY OF THE BOARD OF
DIRECTORS IN THE MANAGEMENT OF THE BUSINESS AND AFFAIRS OF THE FOUNDATION
BETWEEN MEETINGS OF THE BOARD OF DIRECTORS, AND WHICH SHALL HAVE OTHER
POWERS AND DUTIES AS THE BOARD MAY FROM TIME TO TIME DETERMINE, EXCEPT THAT
IT SHALL NOT HAVE THE POWER TO: (I) AMEND THE ARTICLES OF ORGANIZATION OR
BYLAWS OF THE FOUNDATION; (II) FILL VACANCIES ON THE BOARD OF DIRECTORS; OR
(III) TAKE ANY ACTION INCONSISTENT WITH THE ARTICLES OF ORGANIZATION OR
BYLAWS OF THE FOUNDATION. THE MAJORITY OF THE MEMBERS OF THE EXECUTIVE

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

Schedule O (Form 990) (Rev. 12-2024)

LHA 432211 01-15-25

Name of the organization	THE COMMUNITY FOUNDATION FOR OCALA MARION COUNTY INC	Employer identification number	27-5098203
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COMMITTEE SHALL CONSTITUTE A QUORUM FOR THE TRANSACTION OF THE BUSINESS OF THE EXECUTIVE COMMITTEE. THE VOTE OF A MAJORITY OF THE EXECUTIVE COMMITTEE MEMBERS PRESENT AND VOTING AT ANY MEETING OF THE COMMITTEE AT WHICH THERE IS A QUORUM SHALL BE THE ACTION OF THE EXECUTIVE COMMITTEE.

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

THE FORM 990 IS FIRST REVIEWED BY THE PRESIDENT/EXECUTIVE DIRECTOR THEN SENT TO THE FINANCE/AUDIT COMMITTEE WHERE IT IS REVIEWED AND SENT ON TO THE EXECUTIVE COMMITTEE. FROM THERE, A COPY OF THE 990 IS EMAILED TO ALL BOARD MEMBERS FOR REVIEW PRIOR TO FILING.

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

CONFLICT OF INTEREST STATEMENTS ARE SIGNED ANNUALLY IN JANUARY BY BOARD MEMBERS AND THEN FILED IN THEIR RESPECTIVE BOARD FILES.

FORM 990, PART VI, SECTION B, LINE 15A:

COMPENSATION IS DETERMINED AFTER THE EXECUTIVE BOARD COMPLETES THE ANNUAL EVALUATION PROCESS FOR THE EXECUTIVE DIRECTOR. THERE IS A REVIEW OF CURRENT COMPENSATION AND THEN RESEARCH ON VARIOUS COMPENSATION STUDIES ARE REVIEWED TO DETERMINE ANY CHANGES TO COMPENSATION.

FORM 990, PART VI, SECTION C, LINE 19:

THE FOUNDATION MAKES ITS GOVERNING DOCUMENTS AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST. THIS INFORMATION IS ALSO AVAILABLE ON THE FOUNDATION'S WEBSITE.

**Application for Extension of Time To File an Exempt Organization
Return or Excise Taxes Related to Employee Benefit Plans**File a separate application for each return.
Go to www.irs.gov/Form8868 for the latest information.

OMB No. 1545-0047

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 instructions.

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

Type or Print File by the due date for filing your return. See instructions.	Name of exempt organization, employer, or other filer, see instructions. THE COMMUNITY FOUNDATION FOR OCALA MARION COUNTY INC	Taxpayer identification number (TIN) 27-5098203
	Number, street, and room or suite no. If a P.O. box, see instructions. 324 SE 24TH ST	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. OCALA, FL 34471-5362	

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return 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)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08	Form 990-T (governmental entities)	15

• 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 **LAUREN DEIORIO**
324 SE 24TH ST - OCALA, FL 34471-5362Telephone No. **352-622-5020**

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 box ☐. 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.

- 1** I request an automatic 6-month extension of time until **NOVEMBER 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 **24** or
- ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

- 2** 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.	3a	\$	0.
b 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.	3b	\$	0.
c 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.	3c	\$	0.

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

Form **8868** (Rev. 1-2025)