



MONTGOMERY COMMUNITY COLLEGE FOUNDATION

1011 Page Street · Troy, NC 27371 · (910) 576-6222, Ext. 209 · Fax (910) 576-0059

MEMORANDUM

TO: MCC Foundation Board of Directors
FROM: Earle A. Connelly, President
DATE: December 18, 2013
SUBJ: Foundation Board of Directors' Meeting

Foundation Board Agenda

The regular meeting of the Foundation Board of Directors of Montgomery Community College will be held on Wednesday, January 8, 2014 at 11:30 a.m. in the College boardroom in Building 200. Lunch will be provided.

Call to Order – Earle A. Connelly, Foundation President

Welcome – Earle A. Connelly

- * Introduction – Ms. Anne Roberts Samsel
 - New endowed scholarship: Frank Tedder and Edith Whicker Roberts Endowed Scholarship
- * Minutes – **Appendix A – Action**
- * By Laws Revisions – **Appendix B – First Reading (Pages 3 and 5)**

Treasurer Report – Jeanette McBride, Foundation Treasurer

- * Fund Statements – **Appendix C – Action**
- * Fidelity Bank update
 - John H. Slaton, CFP, new representative – **Appendix D**
 - Annual investment objective letter – **Appendix E**
- * Donation Reports – **Appendix F – Action**
- * RFP for Audit Services for 2013/2014 Fiscal Year – **Appendix G – Action**

Foundation Reports – Gay Roatch, Foundation Director

- * Budget Review – **Appendix H**
- * Update on Occupational Scholarships – **Appendix I**
- * Montgomery Scholars Program Criteria – **Appendix J**
- * Mini Grant
 - Mini-Grant Guidelines Review – **Appendix K**
 - Mini-Grant Budget Update – **Appendix L**
 - Mini-Grant Requests – **Appendix M**
- * Official Payments-Web site presentation
- * Friend Raising Events and Budget Review – **Appendix N**
- * Donor Appreciation Event Update– **Appendix O**
 - Donor Appreciation Event Survey Results– **Appendix P**
- * Golf Tournament – Densons Creek – Friday, May 2, 2014 – **Appendix Q**
- * Summer Camps – **Update**
- * Calendar Review – **Appendix R**

**MCC Foundation Board of Directors
December 18, 2013
Page Two**

**2013 Annual Fund Drive, report from Fundraising Committee Chair – Sherrill Bumgarner,
Chairman**

- * 2013 Annual Fund Drive Cumulative Donations – **Appendix S**
- * Fundraising Committee Meeting, 2013 Annual Fund Drive
 - Internal AFD Kick Off, Thursday, January 23, 2014 - Lunch
 - External AFD Kick Off, February 1, 2014 – Breakfast
 - 100% Board Participation – **Appendix T**

Presidents Report

- * Further discussion on Capital Campaign Projects

New Business

Adjourn

**Montgomery Community College
Foundation Board of Directors
October 9, 2013**

Minutes

Members of the Foundation Board of Directors met on Wednesday, October 9, 2013 at 11:30 a.m. in the college boardroom. Present were Jean Abbott, Russell Bittle, Claudia Bulthuis, Sherrill Bumgarner, Gelynda Capel, Earle Connelly, Mary Kirk, Sharon Matheny, Jeanette McBride, Maxton McDowell, Gary McRae, Sandra Miller, Don Piehl, Brenda Ritter, Gay Roatch, Kevin Smith, Sandy Van Sinderen, and Korrie Ervin.

Mr. Connelly welcomed all in attendance.

Mr. Connelly introduced new Board member, Russell Bittle. Mr. Bittle is the general manager of Grede, Inc.

Mr. Connelly presented Dr. Don Piehl with a plaque thanking him for his work with the Foundation and in the community.

Maxton McDowell, CPA, presented Appendix A, the 2012-2013 Foundation Financial Statements. He reported that there were no significant deficiencies with the Foundation's internal control system.

In reference to the financial statements presented by Mr. McDowell, Mrs. Bulthuis asked that the in-kind donations be placed in the line item "Support of College Programs" instead of "Managerial".

Ms. Roatch will forward the monthly investment reports from Fidelity Bank to all Board members. These reports show the costs of selling stocks.

Mr. Connelly presented Appendix B, minutes of the last meeting. Mrs. Miller made a motion, seconded by Mrs. Bulthuis, to approve the minutes from the August 14, 2013 meeting. The motion carried.

Mrs. Capel reported that the nominating committee met this morning. The committee is recommending to the full Board the nomination of Susan Knowles as Fundraiser of the Year. Mrs. Capel made a motion, seconded by Mrs. Abbott, to approve Susan Knowles as 2013 Fundraiser of the Year. Mr. Connelly reported that Mrs. Knowles has been very enthusiastic and successful in helping with our fundraising.

The nominating committee also recommended Midway, USA/Larry and Brenda Potterfield as 2013 Humanitarian of the Year. Midway, USA has recently given \$123,000 to the gunsmithing program. Dr. Kirk reported that they established a \$100,000 endowment, using the interest from these funds for restocking the gunsmithing program inventory. They also donated \$23,000 to bring the current inventory up to date. Mrs. Capel made a motion to approve MidWay, USA/Larry and Brenda Potterfield as 2013 Humanitarian of the Year. Coming from committee, this required no second. The motion carried.

Mrs. McBride presented Appendix C, the July, August and September Fund Statements.

Mrs. McBride presented Appendix D, the donation reports for July, August and September. In August, a \$10,000 donation was received to establish the Riley and Marilyn Phillips Endowed Scholarship. In September, a new NRA scholarship was established for \$6,800.

Dr. Kirk made a motion, seconded by Mrs. Ritter, to approve the fund statements and donation reports. The motion carried.

Ms. Roatch presented Appendix E, the budget review. She reported the Foundation is on budget or under budget on many line items. The remaining funds that have not been expended can be repurposed.

Ms. Roatch presented Appendix F, the summary of occupational scholarships.

Ms. Roatch presented Appendix G, the overview of the Awards Ceremony expenses. This event is for the students and their families and was well attended this year. Remaining funds for this event are \$203.

Ms. Roatch presented Appendix H, the evaluation survey results of the Awards Ceremony. She thanked everyone for their response to the survey.

Ms. Roatch presented Appendix I, the overview of the Gong Show expenses. Ticket sales increased from the previous year. The event raised \$23,000. Ms. Roatch thanked Board members for their support of this event.

Ms. Roatch presented Appendix J, the survey results from the Gong Show. This survey was sent to the Foundation Board, Board of Trustees and MCC Employees to get a broader base of opinions.

Mrs. Matheny made a comment that we check with the Chamber about other events that are going on in the county during September and October before we plan the raffle event next year.

Ms. Roatch will be looking at dates for next year and availability of the Garner Center to hold the raffle.

Ms. Roatch presented Appendix K, the postcard for fundraising events in the Fall. The Veterans Day Recognition will be November 11 on campus, A Christmas Memory presentation will be November 20 in the Blair Auditorium, the donor appreciation event will be a Christmas Carol presentation on December 10 at the James Garner Center. Mrs. Abbott suggested that the postcard have more space for the Christmas Carol donor appreciation event. Mrs. Bulthuis suggested that all events be listed on the postcard as banners and have the Veterans Day and Christmas Memory events the same size and the Christmas Carol donor appreciation event on the bottom half of the card.

The Christmas Carol performance will cost \$2,000. This event will be free to all donors. There was concern that the remaining budget of \$1,000 would not be enough to cover all expenses for the event. There is 867.72 remaining from other budget items that can be repurposed for the event. Mrs. Bulthuis, Mrs. Abbott and Mrs. Matheny will help with the planning of the event.

Ms. Roatch presented Appendix M, a mini-grant application for the MLK Day-On Challenge. This event will be held in partnership with Community In Schools and Eckerd Youth Camp. The grant request is for \$1,000, which is the amount funded last year. There has been increased popularity and support for the MLK Day-On Challenge over the past few years. Mrs. Bulthuis expressed concern over spending one-third of the mini-grant budget for one request. Mrs. Capel made a motion, seconded by Mrs. Ritter, to approve the \$1,000 mini grant request for the MLK Day-On Challenge. The motion carried.

Mrs. Bulthuis suggested that since this event has been recurring for several years, it should be taken out of the mini grant cycle and be added as a permanent line item in the Foundation budget. The January agenda for the Foundation Board will include discussion and review of the mini grant requests and procedures.

Ms. Roatch reported that Sherrill Bumgarner is the new Fundraising Chairman. She presented the update of the 2013 Annual Fund Drive. The fundraising committee will be meeting before the end of the year to discuss the fundraising goals for next year's annual fund drive.

Dr. Kirk had no report to give to the Board.

Mrs. Capel asked that the announcement of Susan Knowles as the Fundraiser of the Year be kept a surprise.

There being no further business, the meeting adjourned.

Earle Connelly, President

**Montgomery Community College
Foundation Board of Directors
Fundraising Committee
November 20, 2013**

Minutes

Members of the Foundation Board Fundraising Committee met on Wednesday, November 20, 2013 at 10:30 a.m. in the Boardroom. Present were Jean Abbott, Sherrill Bumgarner, Susan Eggleston, Mary Kirk, Susan Knowles, Sharon Matheny, Sandra Miller, Gay Roatch, and Korrie Ervin.

Ms. Roatch reported that Sherrill Bumgarner, Chairman of the Fundraising Committee, will be late to the meeting. However, he asked Ms. Roatch to call the meeting to order.

Ms. Roatch called the meeting to order.

Ms. Roatch reported that the Board of Trustees discussed the possibility of a capital campaign and voted that the Foundation postpone a capital campaign until the Board of Trustees can complete a new Strategic Plan and Facility Master Plan. The Board of Trustees plans to complete this planning process in 2014, so that a capital campaign can begin in 2015.

Ms. Roatch reported that Mr. Connelly suggested that in light of the Board of Trustees recent decision that the Foundation Board continue raising funds for scholarships in 2014.

Mrs. Matheny agreed that if the focus is going to be a capital campaign in 2015 we need to build up the scholarship funds in 2014.

Ms. Roatch presented the Annual Fund Drive report, the report showed the totals from 2009-2013. Ms. Roatch mentioned the large in-kind and monetary donations the Foundation received this past year. Dr. Kirk has begun conversations with Brownells regarding a lathe needed for gunsmithing. She also plans to talk with Smith and Wesson about supporting the gunsmithing program.

Mrs. Ervin reported that 2011 was the first year that the Foundation raised their goal to \$175,000 and set a goal of \$25,000 in new pledges.

Ms. Roatch reported that this year we did not reach the goal for pledges.

Dr. Kirk plans to contact large companies in January regarding their support as sponsors for special events for the 2014 year. Companies discussed to be contacted were Aberdeen & Western Railroad, Grede, Walmart, Century Link, Duke-Progress Energy, Randolph Electric Membership Corporation, Growler, Mountaire Farms, Perdue, Republic Services, Jordan Lumber, Unilin, and local banks. It was suggested the letter go out in December.

Ms. Roatch reported that last year she added donors who had given \$1,000 or more from the Montgomery Fund list to the Foundations contact list.

Dr. Kirk discussed different ways the Annual Fund Drive had been set up in past years. Last year Board members picked names they wanted to contact. A letter campaign was also conducted in 2012. In previous years, the donor base was divided up by towns and Board members were on teams to contact donors in each town.

Dr. Kirk made a motion, seconded by Mrs. Knowles, to approve the 2014 Annual Fund Drive goal at \$175,000 with pledge goals at \$25,000. The motion carried. The kick off will be February 1 with a breakfast on campus.

It was suggested to do a dinner to kick off the capital campaign in 2015.

Ms. Roatch plans to have Foundation giving information at the donor appreciation event on December 10.

Only 81 people have confirmed their attendance at the donor appreciation event.

Mr. Bumgarner reported that several companies plan their budgets in September. It would be good to know the budget planning processes for local businesses.

Mrs. Eggleston made a motion, seconded by Mrs. Abbott, for Foundation Board members to pick names of donors they would like to contact. The motion carried.

Mr. Bumgarner said he is proud to be a part of the Foundation and he thinks we do a great job as a team and he looks forward working with the Fundraising Committee.

Mrs. Miller made a motion, seconded by Mrs. Ritter, to adjourn the meeting. The motion carried.

Revised 1/09/13

**BY-LAWS
OF
MONTGOMERY COMMUNITY COLLEGE FOUNDATION, INC.
A NON-PROFIT CORPORATION**

Article I: Offices

Section 1: Principal Office

The principal office of the Corporation shall be located at Montgomery Community College, 1011 Page Street, Troy, North Carolina, 27371.

Section 2: Registered Office

The registered office of the Corporation required by law to be maintained in the State of North Carolina, may be, but need not be, identical with the principal office.

Article II: Directors

Section 1: General Powers

The business and affairs of the Corporation shall be managed by the Board of Directors or by such committees as the Board of Directors may establish.

Section 2: Organization, Number and Terms of Directors

- a. The number of Directors constituting the Board of Directors of the Foundation shall be at least 15. The Board is to be composed of two **ex-officio members** (2) from the Board of Trustees (Chairman, Vice Chairman), three **ex-officio members** (3) from the College Administration (President, Chief Financial Officer, and one (1) faculty member), and ten (10) members at large chosen from the community, which makes at least a fifteen (15) voting member Board. The officers of the Board of Trustees of Montgomery Community College, the President of Montgomery Community College, the Chief Financial Officer of Montgomery Community College and a faculty member of Montgomery Community College elected by a majority of the faculty,

Comment [MSOffice1]: An **ex officio member** is a member of a body (a board, committee, council, etc.) who is part of it by virtue of holding another office.

shall at all times be Directors of the Foundation. The MCC- appointed director to the Foundation, (hereinafter referred to as “Foundation Director”) and the MCC SGA President shall serve as ex-officio members of the Board of Directors, serving without voting powers.

- b. The Foundation Board of Directors shall elect at the first meeting, after July 1 of each year a President, Vice-President, Recording Secretary and such other officers, as it may deem necessary to the effective and efficient operation of the Foundation. The Chief Financial Officer of MCC shall at all times serve as Treasurer of the Corporation. In the absence of the President, the Vice-President shall preside. In the absence of both the President and the Vice-President, the Board may select any one of its members as presiding officer.
- c. At large directors shall be appointed to three-year terms. Classes shall be evenly divided into three rotating classes.
- d. Any vacancies occurring in the Board of Directors for any cause shall be filled by the Board of Directors, by appointment. A Director appointed to fill a vacancy shall be appointed for the unexpired term of his/her predecessor. Any existing member of the Board of Directors may recommend a new member to the Membership Committee
- e. Any Director may be removed from the Board of Directors whenever such removal is in the best interest of the Foundation and upon a simple majority vote of the entire Board.
- f. The Director and Officers of this Corporation shall serve without compensation, except the Foundation Director, who, at the discretion of the Board, may be reimbursed for services rendered. Foundation-related expenses required in the performance of Foundation duties and responsibilities and pre-approved by the officers of the Board shall be reimbursable. Full documentation of expenses, as specified by the officership, must be provided.

- g. All members of the Board of Directors of the Foundation, except the Foundation Director and the MCC SGA President who have no vote, shall be entitled to one vote on any matter presented at a scheduled meeting of the Board of Directors. ~~Members must be present to vote.~~

Section 3: Meetings

- a. The meetings of the Board of Directors of the Montgomery Community College Foundation, Inc. shall be held quarterly on the campus of Montgomery Community College and the day and hour shall be set by the Executive Committee and communicated to the membership five (5) days prior to the meeting.
- b. Special meetings of the Board may be held at any time and place designated by the Board President. Notification of special meetings shall require a minimum of seventy-two (72) hours notice to the membership.
- c. Special email meetings are permissible when there is a need for a decision between regular meetings and a Special called meeting is inconvenient. Proper recording of issue and votes will be recorded in the next quarterly meeting minutes.
- d. A quorum of Directors shall be a majority of the Board of Directors.
- e. An agenda shall be proposed for all Board of Directors' meetings and provided to the membership at the same time that official notice is given of the meeting.
- f. Three consecutive absences from Foundation Board of Directors meetings shall be viewed as resignation from the Foundation Board of Directors, unless such absence is excused by the President of the Foundation Board of Directors.

Article III: Officers of the Foundation

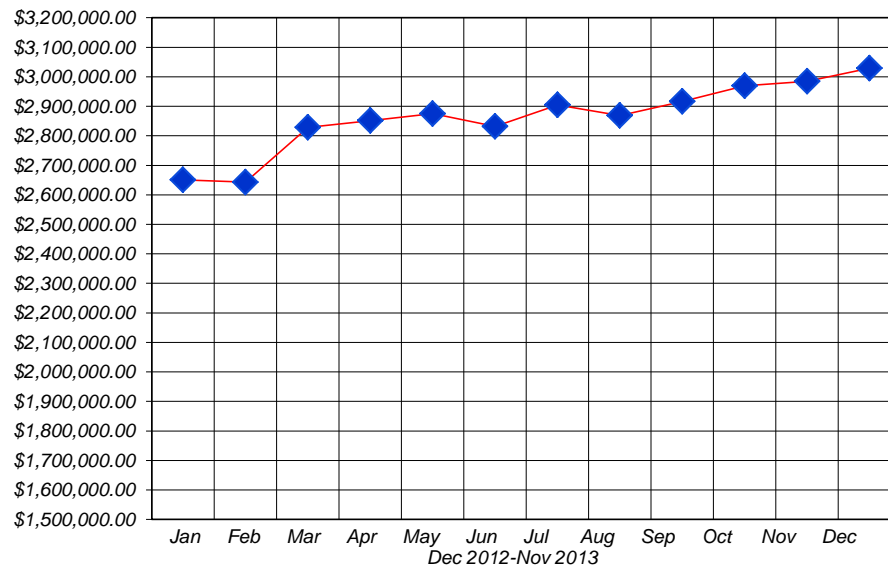
Section 1: Number and Titles

The officers of the Foundation Board of Directors of the Montgomery Community College Foundation shall be: President, Vice-President, Secretary, and Treasurer. The officers shall be elected by and from the Foundation Board of Directors at its first

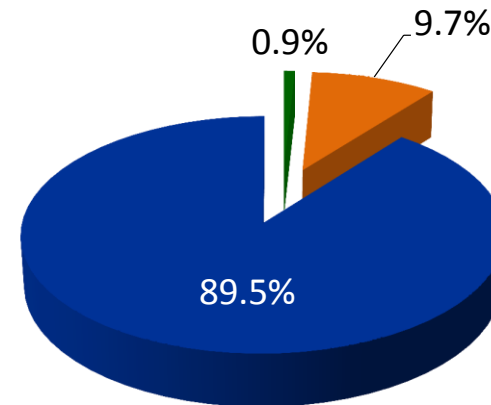
Montgomery Community College Foundation Funds Statement FY 2013-2014

	FYTD				12/1/2013 thru 12/31/2013			
	Fidelity Bank	STIF	First Bank	Total	Fidelity Bank	STIF	First Bank	Total
Beginning Value	\$2,512,463.75	\$297,937.71	\$21,629.49	\$2,832,030.95	\$2,666,247.17	\$292,726.71	\$25,503.84	\$2,984,477.72
Receipts								
Interest/Gains	\$38,538.72	\$663.34	\$4.48	\$39,206.54	\$13,087.30	\$122.78	\$0.57	\$13,210.65
Deposits	\$38,495.00	\$21,075.63	\$92,001.63	\$151,572.26	\$23,070.00	\$91.00	\$24,930.00	\$48,091.00
Total Receipts	\$77,033.72	\$21,738.97	\$92,006.11	\$190,778.80	\$36,157.30	\$213.78	\$24,930.57	\$61,301.65
Disbursements								
Withdrawals/Fees	\$41,373.37	\$26,837.19	\$87,573.74	\$155,784.30	\$1,989.51	\$101.00	\$24,372.55	\$26,463.06
Total Disbursements	\$41,373.37	\$26,837.19	\$87,573.74	\$155,784.30	\$1,989.51	\$101.00	\$24,372.55	\$26,463.06
Market Value Net Change	\$161,951.42	\$0.00	\$0.00	\$161,951.42	\$9,660.56	\$0.00	\$0.00	\$9,660.56
Ending Value	\$2,710,075.52	\$292,839.49	\$26,061.86	\$3,028,976.87	\$2,710,075.52	\$292,839.49	\$26,061.86	\$3,028,976.87
Net Change	\$197,611.77	(\$5,098.22)	\$4,432.37	\$196,945.92	\$43,828.35	\$112.78	\$558.02	\$44,499.15

*Foundation Funds
Value FYTD*



Foundation Funds Distribution



ENDOWED Balances
As of December 31, 2013

Appendix C

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Investment Gains/Losses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Investment Gains/Losses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Investment Gains/Losses	December 2013 Balance
Alan Gutschmit Early Childhood Scholarship Endowed Scholarship	\$ 13,103.99			\$ 281.50	\$ 13,385.49			\$ 107.72	\$ 13,493.22			103.18	\$ 13,596.40
Andy Speer Taxidermy Endowed Scholarship	2,233.15			47.97	2,281.12			18.36	2,299.48			17.58	\$ 2,317.07
Anna Hollers Montgomery Scholars Endowed Scholarship	16,660.64			357.91	17,018.55		286.00	134.66	16,867.21			128.99	\$ 16,996.19
Becky and Eben Wallace CJ Endowed Scholarship	16,825.30			361.45	17,186.75			138.31	17,325.06			132.49	\$ 17,457.55
Better Burger Endowed Scholarship	14,008.67			300.94	14,309.61			115.16	14,424.77			110.31	\$ 14,535.08
Betty M. Reynolds Endowed Scholarship	4,232.17			90.92	4,323.09			34.79	4,357.88			33.33	\$ 4,391.21
Bill Maness Family Endowed Scholarships (2)	22,761.91			488.98	23,250.89			187.12	23,438.01			179.23	\$ 23,617.24
Blanche Bray Farlowe Endowed Scholarship	11,887.36			255.37	12,142.73			97.72	12,240.45			93.60	\$ 12,334.06
Brady and Joan Dickson Scholarship Endowed Scholarship	19,870.26			426.86	20,297.12		167.30	162.00	20,291.82			155.17	\$ 20,447.00
Branson and Lorraine McRae Montgomery Scholars Endowed Scholarship	30,572.80			656.77	31,229.58			251.33	31,480.90			240.74	\$ 31,721.64
Brenda Chriscoe Ritter Endowed Scholarship	11,310.29			242.97	11,553.27			92.98	11,646.24			89.06	\$ 11,735.30
Brittany C. Maness Honorary Endowed Scholarship	12,191.68			261.91	12,453.59			100.22	12,553.81			96.00	\$ 12,649.81
Bulthuis Endowed Scholarship	14,040.30			301.62	14,341.91			115.42	14,457.33			110.56	\$ 14,567.89
Capel Incorporated Endowed Scholarship	54,000.99			1,160.07	55,161.06			443.92	55,604.98			425.22	\$ 56,030.20
Capel, Capel, and Hric Montgomery Scholars Endowed Scholarship	19,032.03			408.85	19,440.88			156.45	19,597.33	300.00		152.16	\$ 20,049.49
Chris Deaton, Jodie Noah, Brandon Simmons and Austin Williams Memorial Endowed Scholarship	17,968.93			386.01	18,354.94			147.72	18,502.66			141.49	\$ 18,644.15
Claire Menard Students Helping Students	11,700.51			251.35	11,951.87			96.19	12,048.05			92.13	\$ 12,140.18
Clay Vance Richardson Memorial Endowed Scholarship	14,443.57			310.28	14,753.85		181.60	117.27	14,689.53			112.33	\$ 14,801.86
Kelly Stafford, Emily Hamilton, Stacey Stafford and Daniel Hamilton Honorary Endowed Scholarship	10,969.49			235.65	11,205.14			90.18	11,295.32			86.38	\$ 11,381.70
Drs. Joseph Reese Blair and Claudia B. Blair Endowed Scholarship	49,344.05			1,060.02	50,404.07			405.64	50,809.71	2,500.00		407.66	\$ 53,717.38
Earle and Jean Connelly Endowed Scholarship	40,542.80			870.95	41,413.75		340.55	330.55	41,403.75			316.62	\$ 41,720.37
Fidelity Bank Biscoe Branch Endowed Scholarship	13,817.48			296.83	14,114.31			113.59	14,227.90			108.80	\$ 14,336.70
Fidelity Bank Candor Branch Endowed Scholarship	13,817.48			296.83	14,114.31			113.59	14,227.90			108.80	\$ 14,336.70
Fidelity Bank Star Branch Endowed Scholarship	18,508.74			397.61	18,906.35			152.15	19,058.51			145.74	\$ 19,204.25
Fidelity Bank Troy Branch Endowed Scholarship	13,817.48			296.83	14,114.31			113.59	14,227.90			108.80	\$ 14,336.70
First Bank Endowed Scholarship	48,755.70			1,047.39	49,803.08			400.80	50,203.88			383.91	\$ 50,587.80
First Bank Montgomery Scholars Endowed Scholarship	15,982.04			343.33	16,325.38			131.38	16,456.76			125.85	\$ 16,582.60
First Bank Montgomery Scholars Endowed Scholarship 2	16,418.76			352.71	16,771.47			134.97	16,906.45			129.29	\$ 17,035.73
First Health of the Carolinas Endowed Scholarship	56,944.75			1,223.31	58,168.06		286.00	465.82	58,347.88			446.19	\$ 58,794.07

ENDOWED Balances
As of December 31, 2013

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Investment Gains/Losses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Investment Gains/Losses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Investment Gains/Losses	December 2013 Balance
FirstHealth of the Carolinas 1 Endowed Scholarship	5,152.46			110.69	5,263.15			42.36	5,305.50			40.57	\$ 5,346.07
FirstHealth of the Carolinas 2 Endowed Scholarship	12,568.42			270.00	12,838.42			103.32	12,941.74			98.97	\$ 13,040.70
First National Bank and Trust Endowed Scholarship (CommunityOne)	13,546.81			291.02	13,837.83		107.25	110.50	13,841.08			105.84	\$ 13,946.92
Fred H. and Louise A. Powell Endowed Scholarship	12,873.82			276.56	13,150.38	25.00		106.03	13,281.41	245.00		103.44	\$ 13,629.85
Frederick Leslie Taylor Endowed Scholarship	11,918.08			256.03	12,174.11			97.97	12,272.08			93.85	\$ 12,365.93
Gelynda T. and Arron W. E. Capel MSP Endowed Scholarship	22,908.33			492.12	23,400.45			188.32	23,588.77	1,000.00		188.03	\$ 24,776.81
Gilbert A. "Sonny" Holt Memorial Nursing Endowed Scholarship	16,765.36			360.16	17,125.52			137.82	17,263.34			132.01	\$ 17,395.36
Grady & Alvis Goforth Boy Scouts and Venture Crew Endowment	11,243.48			241.54	11,485.01			92.43	11,577.44			88.53	\$ 11,665.97
Grady G. Thomas Memorial Endowed Scholarship	35,051.31			752.98	35,804.30			288.14	36,092.44			276.00	\$ 36,368.44
Growler Group Endowed Scholarship	36,123.25			776.01	36,899.26			296.96	37,196.21			284.44	\$ 37,480.66
Hartley & West Endowment	5,647.10			121.31	5,768.42			46.42	5,814.84			44.47	\$ 5,859.30
Hilda Lee Endowed Scholarship	19,938.98			428.34	20,367.32		143.00	162.76	20,387.08			155.90	\$ 20,542.98
J. Paul Russell Endowed Scholarship	25,153.72			540.36	25,694.08			206.78	25,900.86			198.07	\$ 26,098.92
Joan and Frank Kersey Endowed Scholarship	15,217.68			326.91	15,544.59			125.10	15,669.69			119.83	\$ 15,789.52
John and Goldie Wallace Endowed Scholarship	11,029.27			236.93	11,266.21			90.67	11,356.87			86.85	\$ 11,443.72
Johnny Russell Endowed Scholarship	19,047.91			409.19	19,457.10			156.59	19,613.69			149.99	\$ 19,763.67
Jordan Lumber Endowed MSP Scholarship 2	11,838.95			254.33	12,093.28			97.32	12,190.61			93.22	\$ 12,283.83
Jordan Lumber Endowed Scholarship 1	34,284.22			736.50	35,020.72			281.84	35,302.56			269.96	\$ 35,572.52
M.W. "Bill" Mullinix, Sr. and Nancy Hulin Mullinix Endowed Scholarship	13,589.46			291.93	13,881.39		143.00	110.56	13,848.95			105.90	\$ 13,954.86
Madeline and James B. Allen Endowed Scholarship	29,959.04			643.59	30,602.62			246.28	30,848.91			235.90	\$ 31,084.81
Margaret & Herbert C. Green Forestry Endowment	6,629.41			142.42	6,771.82			54.50	6,826.32			52.20	\$ 6,878.52
Mary P. and Charles T. Kirk Endowed Scholarship	18,198.05			390.94	18,588.99			149.60	18,738.59			143.30	\$ 18,881.88
Matt Ellis Endowed Scholarship	19,060.71			409.47	19,470.18			156.69	19,626.87	500.00		153.91	\$ 20,280.78
Matthew and Kim Woodard Endowed Scholarship	15,682.50			336.90	16,019.40		340.55	126.18	15,805.03			120.86	\$ 15,925.89
MidwayUSA Endowed Firearms Fund	105,012.31			2,255.91	107,268.22			863.27	108,131.49			826.89	\$ 108,958.38
Montgomery Insurance Scholarship Endowment	5,600.06			120.30	5,720.36	1,000.00		54.08	6,774.45			51.80	\$ 6,826.25
Montgomery Motors Montgomery Scholars Endowed Scholarship	14,694.02			315.66	15,009.68			120.79	15,130.48			115.70	\$ 15,246.18
Montgomery Scholars Program Endowed Scholarship	43,057.80			924.98	43,982.78			353.96	44,336.74			339.05	\$ 44,675.79
Pat and Howard Burkart Endowed Scholarship	24,662.58			529.81	25,192.39			202.74	25,395.13			194.20	\$ 25,589.33

ENDOWED Balances
As of December 31, 2013

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Investment Gains/Losses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Investment Gains/Losses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Investment Gains/Losses	December 2013 Balance
Progress Energy Endowed Scholarship	41,136.49			883.71	42,020.20			338.17	42,358.37			323.92	\$ 42,682.29
Progress Energy MSP Endowed Scholarship	11,614.42			249.50	11,863.92			95.48	11,959.40			91.45	\$ 12,050.85
Jesse T. " Jack " Pugh Memorial Scholarship	3,823.82			82.14	3,905.96			31.43	3,937.40			30.11	\$ 3,967.51
Quik Chek Montgomery Scholars Endowed Scholarship	8,289.92			178.09	8,468.01			68.15	8,536.16			65.28	\$ 8,601.43
Randolph Electric Membership Corp. Endowed Scholarship	14,427.28			309.93	14,737.21		107.25	117.74	14,747.70			112.78	\$ 14,860.48
Riley and Marilyn Phillips Endowed Scholarship	10,094.42			216.85	10,311.27			82.98	10,394.25			79.49	\$ 10,473.74
Frank Tedder and Edith Whicker Roberts Endowed Scholarship										40,000.00		305.88	\$ 40,305.88
Samantha B.Hussey Memorial Endowed Scholarship	12,295.22	55.00		265.31	12,615.53	55.00		101.97	12,772.50	240.00		99.51	\$ 13,112.00
Springs Industries Endowed Scholarship	36,991.50			794.66	37,786.16			304.09	38,090.25			291.28	\$ 38,381.53
Stanly Regional Medical Center Endowed Scholarship	14,657.65			314.88	14,972.53		167.30	119.15	14,924.37			114.13	\$ 15,038.50
Steve Hamilton Memorial Endowed Scholarship	16,506.15	20.00		355.02	16,881.17	20.00		136.02	17,037.18	40.00		130.59	\$ 17,207.77
Harold & Carolyn VanDerveer Nursing Assistant Endowed Scholarship	3,793.95			81.50	3,875.45			31.19	3,906.64	1,700.00		42.87	\$ 5,649.52
Uwharrie Environmental MSP Endowed Scholarship	19,627.70			421.65	20,049.35			161.35	20,210.70			154.55	\$ 20,365.26
Wanda and Michael Hamilton Memorial Nursing Endowed Scholarship	11,957.20			256.87	12,214.07		71.50	97.72	12,240.29			93.60	\$ 12,333.89
William "Billy" H. Johnson Jr. Endowed Scholarship	874.47	45.00		19.75	939.22	45.00		7.92	992.14	45.00		7.93	\$ 1,045.07
Willis Endowed Scholarship	16,217.42			348.39	16,565.81			133.32	16,699.13			127.70	\$ 16,826.83
Win & Elizabeth Dozier Endowed Scholarship	3,716.88			79.85	3,796.73			30.56	3,827.28			29.27	\$ 3,856.55
Zane Simmons Endowed Scholarship	17,990.24			386.47	18,376.72			147.89	18,524.61			141.66	\$ 18,666.27
General Endowed (Unnamed Funds)	1,124,985.75	75.00		24,168.91	1,149,229.67	200.00		9,250.30	1,158,679.97	585.00		8,865.02	\$ 1,168,129.99
Total Fund Balance	\$ 2,591,218.89	\$ 195.00	\$ -	\$ 55,669.58	\$ 2,647,083.47	\$ 1,345.00	\$ 2,341.30	\$ 21,295.00	\$ 2,667,382.17	\$ 47,005.00	\$ -	\$ 20,758.35	\$ 2,735,145.52

STIF Balances
As of December 31, 2013

Appendix C

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Balance
Alexander Julian Scholarship for Carolina Craft Excellence	\$ 180.00			\$ 180.00			\$ 180.00			\$ 180.00
Allied Health Bldg.	11,550.08	30.00		11,580.08	30.00		11,610.08	60.00		\$ 11,670.08
Bell Tower	510.04			510.04			510.04			\$ 510.04
Brady Energy Services Named Scholarship	500.00			500.00			500.00			\$ 500.00
Brownells Inc. Scholarship	1,500.00	2,000.00		3,500.00			3,500.00			\$ 3,500.00
Bruce Turner Con Ed	1,380.39	45.00		1,425.39	45.00	50.00	1,420.39	90.00		\$ 1,510.39
Business Tech Scholarship	1,205.00			1,205.00			1,205.00			\$ 1,205.00
Chi Sigma Club	0.00			0.00			0.00			\$ -
Career and College Promise	110.00			110.00			110.00			\$ 110.00
Child Study Club	0.00			0.00			0.00			\$ -
College Transfer AA Program	7.13			7.13			7.13			\$ 7.13
Computer Information Technology Program	63.32	5.00		68.32	5.00		73.32	10.00		\$ 83.32
Continuing Ed. Art Class Assistance	1,424.00		90.00	1,334.00		90.00	1,244.00			\$ 1,244.00
Cross Cut Saw	950.00			950.00			950.00			\$ 950.00
Cumberland Community Foundation, Inc.	1,000.00			1,000.00			1,000.00			\$ 1,000.00
Win & Elizabeth Dozier Named Scholarship	637.90			637.90			637.90			\$ 637.90
Duke Energy Carolinas Name Scholarship								350.00		\$ 350.00
Early Childhood Program / Scholarship	1,380.00	20.00		1,400.00	20.00		1,420.00	20.00		\$ 1,440.00
Electrical/Electronics Program	450.00	10.00		460.00	10.00		470.00	20.00		\$ 490.00
Emergency Financial Aid	2,625.00			2,625.00			2,625.00			\$ 2,625.00
Entrance Landscaping	849.33			849.33			849.33			\$ 849.33
FACTS (eCashier)	5,000.00			5,000.00			5,000.00			\$ 5,000.00
Forestry Building	180.73	10.00		190.73	10.00		200.73	20.00		\$ 220.73

STIF Balances
As of December 31, 2013

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Balance
Forestry Program	914.38	10.00		924.38	10.00		934.38	220.00		\$ 1,154.38
Friends of NRA scholarship	5,000.00			5,000.00			5,000.00			\$ 5,000.00
Friends of the Library	1,632.06			1,632.06			1,632.06			\$ 1,632.06
Friend Raising Events	285.00			285.00			285.00			\$ 285.00
GED Fees Assistance	80.00			80.00			80.00			\$ 80.00
Gelynda T. Capel NCCF funds	70.00	10.00		80.00	10.00		90.00	10.00		\$ 100.00
General Building Fund	4,002.33	10.00		4,012.33	10.00		4,022.33	20.00		\$ 4,042.33
Glenn & Lynne Hancock Scholarship	3,135.04	25.00		3,160.04	50.00		3,210.04	100.00		\$ 3,310.04
Grede Scholarship	1,000.00		1,000.00	0.00			0.00			\$ -
Gunsmithing Program	26,464.76	225.00		26,689.76	25.00		26,714.76	50.00		\$ 26,764.76
Harold & Carolyn VanDerveer Named Scholarship	514.00			514.00	101.00	202.00	413.00	800.00	101.00	\$ 1,112.00
Human Services Program	60.00			60.00			60.00			\$ 60.00
Hunters Helping Kids Named Scholarship	275.00			275.00			275.00			\$ 275.00
HVAC Program	345.69	5.00		350.69	5.00		355.69	10.00		\$ 365.69
JF and Jean Allen Family Scholarship-NCCF	104.40			104.40			104.40			\$ 104.40
J. & M. Hickman Scholarship	216.66			216.66			216.66			\$ 216.66
Lola S. James Memorial Scholarship	68.40			68.40			68.40			\$ 68.40
Medical Assisting Program	301.50			301.50			301.50			\$ 301.50
Metal Engraving	232.95			232.95			232.95			\$ 232.95
Minority Male Mentoring Program	650.42	20.00		670.42	20.00		690.42	40.00		\$ 730.42
Minority Male Mentoring Scholarship	1,010.00	30.00		1,040.00	30.00		1,070.00	60.00		\$ 1,130.00
Morgan Hutchison Scholarship	10.00	10.00		20.00	10.00		30.00	20.00		\$ 50.00
Mt. Gilead Civitan Club	0.00			0.00			0.00			\$ -

STIF Balances
As of December 31, 2013

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Balance
Mt. Gilead Lions Club	0.00			0.00			0.00			\$ -
NCCF funds: anonymous	1,399.80			1,399.80			1,399.80			\$ 1,399.80
NRA Foundation	6,800.00			6,800.00			6,800.00			\$ 6,800.00
Nursing Program	30.00			30.00			30.00			\$ 30.00
Nurse Pinning Ceremony	334.27	25.00		359.27			359.27			\$ 359.27
Office Admini. - Marketing	9.04			9.04			9.04			\$ 9.04
OST Program	21.62			21.62			21.62			\$ 21.62
PERSIST Program	695.36			695.36			695.36			\$ 695.36
Pottery Program	2,455.00			2,455.00			2,455.00			\$ 2,455.00
Professional Development	2,368.40	10.00		2,378.40	10.00		2,388.40	20.00		\$ 2,408.40
Employee Memorial Garden	23.19			23.19			23.19			\$ 23.19
Ribbon of Hope Grant	9,910.06			9,910.06			9,910.06			\$ 9,910.06
Theodore C. Sanders Gunsmithing Scholarship	2,000.00			2,000.00			2,000.00			\$ 2,000.00
Shooting Club	113.24	5.00		118.24	5.00		123.24	10.00		\$ 133.24
Shooting & Hunting Sports Mgmt	91,441.83			91,441.83			91,441.83			\$ 91,441.83
Shooting Range	70,000.00			70,000.00			70,000.00			\$ 70,000.00
Spring Clay Camp 2013	282.47			282.47			282.47			\$ 282.47
Summer Clay Camp 2012	66.44			66.44			66.44			\$ 66.44
Summer Camp 2013 - Clay	0.00			0.00			0.00			\$ -
Summer Camp 2013 - Forestry	0.00			0.00			0.00			\$ -
Summer Camp 2013 - Photography	87.31			87.31			87.31			\$ 87.31
Summer Camp 2013 - Entrepreneurship	0.00			0.00			0.00			\$ -
Taxidermy Program	20.00			20.00			20.00			\$ 20.00

STIF Balances
As of December 31, 2013

Fund Name	September 2013 Balance	October 2013 Contributions	October 2013 Expenses	October 2013 Balance	November 2013 Contributions	November 2013 Expenses	November 2013 Balance	December 2013 Contributions	December 2013 Expenses	December 2013 Balance
Testing Center	105.00	15.00		120.00	15.00		135.00	30.00		\$ 165.00
Troy Rotary	676.40			676.40			676.40			\$ 676.40
Women's Minority Mentoring (Women of Empowerment)	213.13			213.13			213.13			\$ 213.13
Woodrow Robinson Scholarship-NCCF	340.00			340.00			340.00			\$ 340.00
Diane Nelson Scholarship Fund	1,155.00	30.00		1,185.00	30.00		1,215.00	40.00		\$ 1,255.00
Dental Assisting Program	1,680.00			1,680.00			1,680.00			\$ 1,680.00
Food Service Technologies	120.00			120.00			120.00			\$ 120.00
Multi-Purpose Room Repairs	12,500.00			12,500.00			12,500.00			\$ 12,500.00
Accounting Program	125.00			125.00			125.00			\$ 125.00
Sandhills Dental Asst. Scholars	1,470.00	20.00		1,490.00	20.00		1,510.00	40.00		\$ 1,550.00
Dr. Charles Highsmith Nurses Scholarship-NCCF	0.00			0.00			0.00			\$ -
Mr. and Mrs. William B. Landon Scholarship	175.90			175.90			175.90			\$ 175.90
Student Union/Sports Courts	1,090.00	300.00		1,390.00	300.00	1,690.00	0.00	600.00		\$ 600.00
Accumulated Interest	6,490.25	107.13		6,597.38	113.36		6,710.74	122.78		\$ 6,833.52
BB & T Bank ERROR	4.00			4.00			4.00			\$ 4.00
Fund Balance	\$ 292,078.22	\$ 2,977.13	\$ 1,090.00	\$ 293,965.35	\$ 884.36	\$ 2,032.00	\$ 292,817.71	\$ 2,562.78	\$ 101.00	\$ 295,479.49



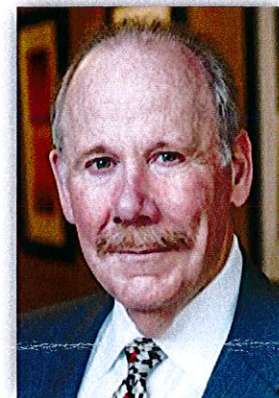
John H. Slayton, CFP®
Managing Director – Trust/ E.V.P.
john.slayton@fidelitybanknc.com
(919) 557-4593 Fuquay Varina
(336) 380-2109 Cellular

Mr. Slayton has over thirty years' experience in the trust, securities and financial planning industries. He leads our wealth management efforts from our Fuquay Varina and Burlington, North Carolina, offices.

Prior to joining Fidelity Trust, Mr. Slayton served as President/CEO and General Counsel of Trust Company of the South, a North Carolina chartered, independent, trust company, with offices in Burlington, Raleigh and Charlotte. Assets under management increased twenty-five fold during his seventeen year tenure.

Prior to moving to North Carolina, Mr. Slayton served as General Counsel/Investment Advisor to Gordon P. Getty and his \$1.5 billion Family Trust in Washington, DC. In addition to legal/investment representation of the Getty Trust and family, Mr. Slayton was responsible for the diligence, selection, contracting and monitoring of investment managers and direct investments. Prior to that time, Mr. Slayton was a corporate securities attorney in the Washington, DC offices of Pillsbury, Madison & Sutro and Metzger, Shadyac & Schwarz. Mr. Slayton earned an L.L.M. - Taxation from Georgetown University Law Center (1986), an M.B.A. – Finance and Investments from George Washington University School of Government and Business Administration (1982), a Juris Doctorate Cum Laude from George Washington National Law Center (1980), and an Honors B.A. in Political Science Cum Laude from Marquette University (1977).

Mr. Slayton is a Past Chair of the Trust and Investment Services Subcommittee of the American Bar Association's Banking Law Committee. He is a Past Chair of the



Legislative Committee and the Uniform Trust Code Subcommittee and Council member of the North Carolina Bar Association's Estate Planning & Fiduciary

Law Section. He is also a member of the Joint Committee of the North Carolina Bar Association and Bankers Association, NAPFA, the Triangle Association of the Financial Planning Association, the Greensboro Chapter of the Society of Financial Professionals and the Greensboro Estate Planning Council.

Mr. Slayton is a columnist, speaker, textbook and article author and continuing education instructor on estate planning, fiduciary and investment matters. He has served as an expert witness in federal and state courts on fiduciary law and investment issues. Mr. Slayton is an Adjunct Assistant Professor of Finance and member of the Board of Advisors for the Love School of Business at Elon University. He serves on the boards of numerous local organizations: Alamance Rotary (past president), Meals on Wheels (past president) and Salvation Army (Finance Director), as well as Chair of his church's Finance Council.

John is a Certified Financial Planner professional and holds the Accredited Estate Planner (AEP) and Certified Trust and Financial Advisor (CTFA) designations. John and his wife, Judith, have two children.



December 6, 2013

Montgomery Community College Foundation
Attn: Mrs. Gay Roatch
1011 Page Street
Troy, NC 27371

Dear Mrs. Roatch:

This letter has been sent to inform you of the investment objective of the Montgomery Community College Foundation IMA, Investment Management Agency. The account is invested in a mix of 50% equity assets, 50% fixed income assets, and 0-2% money market funds.

Fidelity Bank Trust & Investment Management feels this mix of assets will provide an appropriate amount of growth while putting an emphasis on protecting the assets in the account from fluctuating market cycles. We regularly review the account to make sure it is invested according to the selected objective. Annually, the investment objective is reviewed to make sure it is still appropriate in meeting the account's goals and directives. We will continue to update you annually on the account's investment objective. Also, we will continue to provide you with monthly accounting.

As always, if you have any questions or concerns, please feel free to contact us as any time. My direct number is 919-557-4592.

Kind Regards,

A handwritten signature in black ink that reads 'Eric Herring'.

Eric Herring
Trust Operations Officer
Fidelity Bank Trust & Investment Management

October

<u>Amount</u>	<u>Fund</u>
\$2,000.00	Brownells Gunsmithing Scholarship
\$10.00	Gelynda T. Capel Scholarship
\$5.00	Computer Information Technologies Program
\$20.00	Early Childhood Program
\$10.00	Electrical/Electronic Technologies Program
\$10.00	Forestry Building
\$10.00	Forest Management Technology Program
\$10.00	General Building Fund
\$75.00	General Scholarship Fund
\$1,217.00	Gong Show Dinner & Raffle
\$225.00	Gunsmithing Program
\$20.00	Steve Hamilton Memorial Scholarship
\$25.00	Glenn and Lynne Hancock Scholarship
\$30.00	Health Sciences Building
\$55.00	Samantha B. Hussey Memorial Endowed Scholarship
\$5.00	HVAC Program
\$45.00	William "Billy" H. Johnson Jr. Endowed Scholarship
\$20.00	Minority Male Mentoring Program
\$30.00	Minority Male Mentoring Scholarship
\$10.00	Morgan Hutchison Scholarship
\$30.00	Diane G. Nelson Scholarship
\$25.00	Nursing Pinning Ceremony
\$10.00	Professional Development Fund
\$20.00	Sandhills Dental Assistants Society Scholarship
\$300.00	Student Union Fund
\$15.00	Testing Center
\$5.00	Trailblazer Shooting Club
\$45.00	Bruce Turner Continuing Education Scholarship
\$4,282.00	

November

<u>Amount</u>	<u>Fund</u>
\$10.00	Gelynda T. Capel Scholarship
\$5.00	Computer Information Technologies Program
\$75.00	Donor Appreciation Event (Ticket Sales)
\$20.00	Early Childhood Program
\$10.00	Electrical/Electronic Technologies Program
\$10.00	Forestry Building
\$10.00	Forest Management Technology Program
\$150.00	Friend Raising Events (INKIND)
\$10.00	General Building Fund
\$200.00	General Scholarship Fund
\$50.00	Gong Show Dinner & Raffle INKIND
\$1,145.00	Gong Show Dinner & Raffle
\$25.00	Gunsmithing Program
\$20.00	Steve Hamilton Memorial Scholarship
\$50.00	Glenn and Lynne Hancock Scholarship
\$30.00	Health Sciences Building
\$55.00	Samantha B. Hussey Memorial Endowed Scholarship
\$850.00	HVAC Program-INKIND
\$5.00	HVAC Program
\$45.00	William "Billy" H. Johnson Jr. Endowed Scholarship
\$20.00	Minority Male Mentoring Program
\$30.00	Minority Male Mentoring Scholarship
\$1,000.00	Montgomery Insurance Endowed Scholarship
\$10.00	Morgan Hutchison Scholarship
\$30.00	Diane G. Nelson Scholarship
\$25.00	Fred H. and Louise A. Powell Endowed Scholarship
\$10.00	Professional Development Fund
\$20.00	Sandhills Dental Assistants Society Scholarship
\$300.00	Student Union Fund
\$15.00	Testing Center
\$5.00	Trailblazer Shooting Club
\$45.00	Bruce Turner Continuing Education Scholarship
\$101.00	Harold & Carolyn VanDerveer Nursing Assistant Named S
\$4,386.00	

December

<u>Amount</u>	<u>Fund</u>
\$2,500.00	Drs. Joseph Reese Blair and Claudia B. Blair Endowed Scholarship
\$1,000.00	Gelynda T. and Arron W. E. Capel MSP Endowed Scholarship
\$300.00	Capel, Capel, and Hric MSP Endowed Scholarship
\$10.00	Gelynda T. Capel Scholarship
\$10.00	Computer Information Technologies Program
\$195.00	Donor Appreciation Event (Ticket Sales)
\$350.00	Duke Energy Carolinas Named Scholarship
\$20.00	Early Childhood Program
\$20.00	Electrical/Electronic Technologies Program
\$500.00	Matt Ellis Endowed Scholarship
\$20.00	Forestry Building
\$220.00	Forest Management Technology Program
\$20.00	General Building Fund
\$585.00	General Scholarship Fund
\$100.00	15th Annual Golf Tournament
\$1,410.00	Gong Show Dinner & Raffle
\$50.00	Gunsmithing Program
\$40.00	Steve Hamilton Memorial Scholarship
\$100.00	Glenn and Lynne Hancock Scholarship
\$60.00	Health Sciences Building
\$240.00	Samantha B. Hussey Memorial Endowed Scholarship
\$10.00	HVAC Program
\$45.00	William "Billy" H. Johnson Jr. Endowed Scholarship
\$40.00	Minority Male Mentoring Program
\$60.00	Minority Male Mentoring Scholarship
\$20.00	Morgan Hutchison Scholarship
\$40.00	Diane G. Nelson Scholarship
\$245.00	Fred H. and Louise A. Powell Endowed Scholarship
\$20.00	Professional Development Fund
\$40,000.00	Frank Tedder and Edith Whicker Roberts Endowed Scholarship
\$40.00	Sandhills Dental Assistants Society Scholarship
\$600.00	Student Union Fund
\$30.00	Testing Center
\$10.00	Trailblazer Shooting Club
\$90.00	Bruce Turner Continuing Education Scholarship
\$1,700.00	Harold & Carolyn VanDerveer Nursing Assistant Endowed Scholarship
\$800.00	Harold & Carolyn VanDerveer Nursing Assistant Named Scholarship
\$51,500.00	

Request for Proposal

The Montgomery Community College Foundation, Inc. (hereinafter called "Foundation") invites qualified independent auditors (hereinafter called "auditor") having sufficient governmental accounting and auditing experience in performing an audit in accordance with the specifications outlined in this Request for Proposal (RFP) to submit a proposal.

There is no expressed or implied obligation for the Foundation to reimburse firms for any expenses incurred in preparing proposals in response to this request.

Type of Audit:

The audit will encompass a financial examination of the Foundation's basic financial statements and supplementary information in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Governmental Auditing Standards issued by the Comptroller General of the United States (GASB).

Period:

The Foundation intends to continue the relationship with the auditor for no less than one year starting with the first audit period of July 1, 2013 – June 30, 2014. Continuation after the first year will be based on annual reviews of the timeliness of completion of the audit and satisfactory working relations with Foundation staff. In accordance with state regulations, the Foundation will be required to issue a new RFP every five years.

Requirements:

1. The audit must be conducted in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Governmental Auditing Standards issued by the Comptroller General of the United States.
2. The auditor will prepare, type, and print the audited financial statements and prepare the federal information return for the year audited.
3. A preliminary draft of the audit, adjusted trial balance, and any required journal entries must be submitted to the Foundation's Director, no later than the September 1, 2014, for proofing and reconciliation to the Foundation's records. The Director will return the draft with proposed revisions within 15 days.
4. The audit must be completed and reports rendered to the Foundation by September 30, 2014. A minimum number of 15 copies of each audit report and other applicable reports must be supplied to the Director within the time frame cited above. The Form 990 must be completed and rendered to the Foundation by November 1, 2014. (due to be mailed by November 15)
5. The financial audit opinion will cover the basic financial statements, the changes in its financial position, and its cash flows for the audit year. Supplemental information, as required by GASB 34 and 35 will be subjected to the tests and other auditing procedures applied in the audit of the basic financial statements, and an opinion will be

given as to whether the supplemental information is fairly stated in all material respects in relation to the financial statements taken as a whole.

6. The audit will include the following:
 - a. Pre-Planning conference
 - b. Overview of the financial condition and presentation to the Director and Foundation Board.
7. The working papers shall be retained and made available upon request for no less than three years from the date of the audit report.
8. In the event that circumstances arise during the audit that require work to be performed in excess of the original estimates, any additional costs will be negotiated prior to commencement of the work and an amended contract will be approved by the Finance Committee of the Board of Directors.

Audit Contract & Payment of Audit Fees:

The Finance Committee of the Board of Directors as well as the NC State Auditors office must approve the audit contract. Payment of audit fees will be released upon receipt of the Final Audit.

Contact Information:

Gay Roatch
Foundation Director
Montgomery Community College Foundation
email: roatchg@montgomery.edu
Phone: 910-576-6222, ext. 209
Fax: 910-576-0059

Accountants:

CBC Business Services, Troy
CHC Services, Mt. Gilead
Premier Accounting and Business Consultants LLC, Biscoe
Gregory L. Blake, Troy,
Larry W. Lassiter, CPA, Troy
Maxton C. McDowell, CPA, Asheboro
Dixon Hughes Goodman LLP, Pinehurst

FY 2013-14

Ambassador Scholarship/Blazers (4 @ \$1500)

Mini-Grants

Professional Development Awards (2 @ \$750)

Annual Audit

Workshops/Lecture Series/Friend Raising

Awards Ceremony (August)

Raffle/Dinner Show

Donor Appreciation (November)

Golf Tournament (April)

Donor/Endowment Wall Maintenance

Annual Fund Drive

Miscellaneous/contingency

Insurance

Occupational Scholarships

College and Career Promise Books

End of year projected balance (roll over)

Total Expenditures

Jul-Sept 1st Qtr. Expenses	Oct-Dec 2nd Qtr. Expenses	Year-to- Date	2013-2014 Budget	Amount Remaining	Revenue Goals 2013-2014	Revenue Actual 2013-2014
\$3,000.00		\$3,000.00	\$6,000.00	\$3,000.00	*\$800.00	
		\$0.00	\$3,000.00	\$3,000.00	\$0.00	
		\$0.00	\$1,500.00	\$1,500.00	\$0.00	
	\$3,750.00	\$3,750.00	\$4,000.00	\$250.00	\$0.00	
	\$185.81	\$185.81	\$2,000.00	\$1,814.19	\$0.00	
\$596.38		\$596.38	\$800.00	\$203.62	\$0.00	
\$6,463.78	\$739.17	\$7,202.95	\$7,500.00	\$297.05	\$23,500.00	\$23,602.05
\$1,000.00	\$1,544.66	\$2,544.66	\$3,000.00	\$455.34	\$0.00	
		\$0.00	\$5,500.00	\$5,500.00	\$13,500.00	
\$55.13		\$55.13	\$1,000.00	\$944.87	\$0.00	
		\$0.00	\$1,300.00	\$1,300.00	\$0.00	
\$196.35	\$973.40	\$1,169.75	\$700.00	-\$469.75	\$0.00	
\$1,343.00		\$1,343.00	\$1,500.00	\$157.00	\$0.00	
\$3,290.60	\$301.60	\$3,592.20	\$10,000.00	\$6,407.80	\$0.00	
	\$5,000.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	
					\$10,000.00	
\$15,945.24	\$7,193.04	\$23,439.88	\$52,800.00	\$24,360.12	\$47,800.00	\$23,602.05

Excellence in Teaching - Rebekah Bunting

Staff Member of the Year - Phyllis Parsons

*\$800 from SGA towards Ambassador Scholarships

Miscellaneous/Contingency Budgeted Amount		\$700.00
8/22/2013	Trophy Shop	96.64
8/31/2013	First Bank cc for Versa Check	34.39
8/31/2013	First Bank cc for Food Lion (bd mtg, lunch)	19.23
8/31/2013	Food King-fd bd lunch	46.09
10/15/2013	MMMClub, lunch for Board Meeting	126.00
10/15/2013	First Bank CC-IntiutMarke for Checks	136.93
10/23/2013	Troy Rotary	360.00
10/23/2013	Montgomery Herald-Baby Scholarship Ad	189.00
11/8/2013	Food Lion (cake for lunch)	17.09
12/2/2013	First Bank cc for Vistaprint-Christmas Cards	144.38
		1,169.75
	Current Overage	-469.75
	Projected 2014 expenses	
January	Board Meeting Lunch	130.00
April	Board Meeting Lunch	130.00

Occupational Scholarships

as of September 30, 2013

Date Paid	Name	Course	Course Start Date	Course End Date	Course Costs	Paid by Student	Paid by Occupational Scholarship
9/10/2013	James K. Callicutt	Intro. To Welding Mig, tig, stig	9/9/2013	11/20/2013	366.60	266.60	\$100.00
9/10/2013	Drameco Kindle, Jr.	Intro. To Welding Mig, tig, stig	9/9/2013	11/20/2013	366.60	165.00	\$201.60
9/10/2013	Anay Lopez	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Micaela N. Morris	Nurse Aide Level I Day	8/19/2013	10/30/2013	387.60	287.60	\$100.00
9/10/2013	Keanna N. Butler	Nurse Aide Level I Day	8/19/2013	10/30/2013	387.60	195.00	\$192.60
9/10/2013	Samantha Caveness	Phlebotomy	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Andres L. Connins	Nurse Aide Level II	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Quintura M. Cross	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Glenda P. Garrison	Phlebotomy	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Kaeley P. Humbertson	Nurse Aide Level I Day	8/19/2013	10/30/2013	387.60	195.00	\$192.60
9/10/2013	Katelynn N. Koval	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Christopher T. Parrish	Phlebotomy	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Vickie L. Reeder	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Stephanie D. Sanders	Phlebotomy	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Valerie C. sanders	Phlebotomy	8/15/2013	12/31/2013	427.60	235.00	\$192.60
9/10/2013	Brittany R. Smith	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Ciera Spinks	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
9/10/2013	Cidney Townsend	Nurse Aide Level I Evening	8/15/2013	12/31/2013	387.60	195.00	\$192.60
10/15/2013	Bailey S. Stone	Welding Certification Preparation	9/9/2013	12/14/2013	201.60	101.60	\$100.00
10/15/2013	Michael P. Hall	Intro. To Welding Mig, tig, stig	9/9/2013	11/20/2013	366.60	165.00	\$201.60
							\$3,592.20
		18 Scholarships Awarded				Balance Remaining 9/30/2013	\$6,407.80

We have received some requests for Montgomery Scholars Program Scholarships for students from the Montgomery Learning Academy.

Below is an excerpt from the Montgomery Scholars Program brochure and it states clearly in the Objective and Qualification that the program is for students graduating from East or West Montgomery High Schools (copy of complete brochure also included below).

Would the board like to reconsider this restriction?

Montgomery Scholars Program

Objective:

To provide every graduate of East or West Montgomery High School with an authorized scholarship to Montgomery Community College beginning the fall semester of the year of graduation. The scholarship is designed to follow the student through to a diploma and/or associate degree.

Qualifications:

The following criteria apply in awarding a *Montgomery Scholars* Scholarship:

- Student must be a graduate of East or West Montgomery High School.
- Student must maintain full-time status with degree or diploma objectives.
- Student must begin studies the year of high school graduation.
- Student will agree to accept other

Montgomery Scholars Program

Objective:

To provide every graduate of East or West Montgomery High School with an authorized scholarship to Montgomery Community College beginning the fall semester of the year of graduation. The scholarship is designed to follow the student through to a diploma and/or associate degree.

Qualifications:

The following criteria apply in awarding a *Montgomery Scholars* Scholarship:

- Student must be a graduate of East or West Montgomery High School.
- Student must maintain full-time status with degree or diploma objectives.
- Student must begin studies the year of high school graduation.
- Student will agree to accept other scholarship funding in lieu of the *Scholars* program, if available.
- Graduates from previous years would not qualify but would be considered for other scholarships.
- Student must complete appropriate applications following College guidelines and timelines.



Students must complete appropriate applications according to College guidelines.

Funding

How can you help us accomplish this dream of providing a scholarship for every high school graduate in our county? The following examples are provided to help you with choosing an appropriate funding method:

- A donation of \$10,000 would support one scholarship per year in perpetuity.
- A donation of \$2,500 each year for six years would qualify for one scholarship per year and in perpetuity at the end of six years.
- A donation of \$1,000 would support one scholarship for one year.



The *Montgomery Scholars Program* will follow the student through to a diploma and/ or associate degree.

Other donations setting up larger endowed Montgomery Scholars Scholarships would provide adequate scholarship monies and additional funds for college fees and books.

Although the objective would be a scholarship for every Montgomery County high school student to begin the year of graduation, scholarships will be limited until funds are available, and a set number given on a first-come, first-serve basis.

Montgomery Scholars Donor

Name _____

Company _____

Address _____

City/State/Zip _____

Phone _____

Yes! I wish to give in the following manner:

() A donation of \$10,000 to support an endowed scholarship providing one permanent scholarship per year.

() A donation of \$2,500 each year for six years, setting up an endowed scholarship providing one scholarship per year, becoming permanent following the last payment.

() A donation of \$1,000 to support one scholarship for one year.

() A donation of \$_____ to support this program.

Montgomery Community College Foundation

Montgomery Community College
1011 Page Street
Troy, NC 27371

Phone: (910) 576-6222 ext. 377
Fax: (910) 576-2176



Montgomery Community College Foundation Purpose

To support, promote, and strengthen Montgomery Community College, its programs, activities, mission and goals by aiding in the establishment of an expanded financial base for the College's various functions. Further, the Foundation will provide for the College's clients and employees a source of revenue to provide broader educational opportunities

Officers:

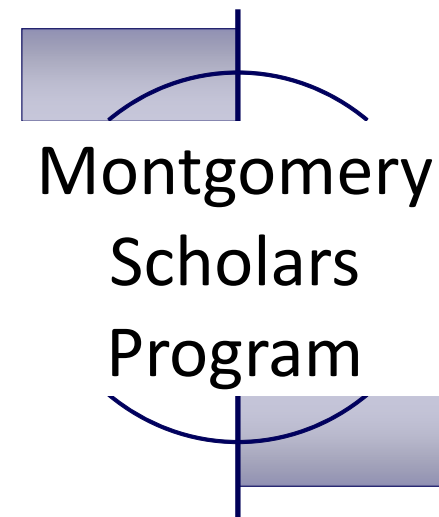
Earle A. Connelly, President
Sherrill L. Bumgarner, Vice-President
Dr. Mary P. Kirk, Secretary
Jeanette D. McBride, Treasurer

Board Members:

Jean A. Abbott	D. Gary McRae
Russell S. Bittle	Sandra A. Miller
Claudia B. Bulthuis	Rose M. Reynosa
Gelynda T. Capel	Brenda C. Ritter
Susan P. Eggleston	Kevin L. Smith
Susan L. Knowles	Adrian VanSinderen
Sharon K. Matheny	



Montgomery Community College Foundation
1011 Page Street
Troy, NC 27371



Montgomery Scholars Program

A scholarship for every student



Mini-Grant Proposal Guidelines

The MCC Foundation will fund selected projects of the College each calendar year. In order for projects to be considered for funding, a mini-grant proposal must be approved by your respective supervisor, Vice President and the President (if direct report). The President will forward the proposal to the Foundation Board for final approval. Guidelines governing these proposals follow.

Project Requirements

Grant requests are open to all areas of the College, and all proposed projects must demonstrate a direct benefit to the College and enhance the student experience. Proposals for program support or other departmental projects must show that there are no available funds in their respective budgets **both state and MCC Foundation funds**. The proposal must include a method of evaluating the effectiveness or value of the request. For example, in a proposal for student emergency financial assistance, documentation could be provided indicating the number of students and the needs that will be met with Foundation funds. Funds available each year for mini-grant proposals are contingent on the success of Foundation special projects, i.e. Reverse Raffle, Golf Tournament. Proposals are funded for one year only and must be used by June 30 of each year.

Submission of Proposals

Proposals must be submitted to respective supervisors, Vice Presidents or President (if direct report) at any time during the fiscal year. Within five working days, the supervisor, and Vice President will recommend/not recommend the mini-grant application to the College President. The President will make a recommendation to be presented to the Foundation Board of Directors for final approval. Grant recipients will be notified of funding within 10 days of submitting the grant proposal.

Proposal Reporting

By June 30th of each year, the administrator of the funded proposal will be required to present to the Board a narrative follow-up report on the outcome of the grant activities. This report should be specific in detailing purchases, sponsored activities, or other verification of expenditures.

Proposal Budgets

Each funded mini-grant will be expended directly through the Foundation Office. Grant expenditures should parallel the proposed activities and will be monitored through the President's Office. At the end of the grant period (June 30), any monies remaining will revert to the Foundation.



Mini-Grant Proposal Application

Name of Project _____

Amount of Funding Requested _____

Does the proposal commit the College to continuing expense beyond the grant period?
Yes _____ No _____

Is there funding available in your program or department budget?
Yes _____ No _____

Individual submitting proposal _____

Brief description of grant project:

Expected Budget:

Item	Estimated Cost
Total	

Supervisor _____ Date _____

Vice President _____ Date _____

President _____ Date _____

Submit to respective supervisor, Dean or President (if direct report).

MCC FOUNDATION, INC.

Mini-Grants to Date

December 31, 2013

As approved by the Foundation Board of Directors
(record to be found in the official minutes)

Name of Project	Amount Approved	Amount Spent	Individual	Date
MLK Challenge	\$1,000		Amy Friery	October 2013
Student Competition	\$250	\$250.00	Mike Collins	May 2013 (email vote)
Empowerment Explosion 2013: "It's Time for Some Action"	\$500	\$480.38	Crystal Thomas	January 2013
Brownells Gunsmithing Career Fair	\$500	\$500.00	Wayne Bernauer	January 2013
Community Service Scholarship Fund	\$250	\$0.00	Lewis Edwards	January 2013
MLK Challenge	\$1,000	\$1,000.00	Kiera DesChamps	October 2012
Diversity Team	\$500	\$392.85	Kiera DesChamps	October 2012
Brownells Gunsmithing Career Fair	\$400	\$399.98	Wayne Bernauer	January 2012
Empowerment Explosion 2012: "Leading by Example"	\$350	\$350.00	Margo Gaddy	January 2012
S.P.E.C.I.A.L. Operations (Serving People Equally Capable In All Levels)	\$250	\$245.79	Margo Gaddy	January 2012
MLK Challenge	\$1,000	\$986.29	Kiera DesChamps	August 2011
Diversity Team	\$500	\$371.22	Kiera DesChamps	August 2011
Student Literary Magazine	\$500	\$500.00	Mary Chesson	August 2011
Empowerment Explosion 2011: "Be Empowered Through Mentoring"	\$450	\$428.00	Margo Gaddy	February 2011
Brownells Gunsmithing Career Fair	\$450	\$450.00	Wayne Bernauer	February 2011
MLK Challenge	\$800	\$773.95	Kiera DesChamps	October 2010
Diversity Team	\$500	\$457.47	Kiera DesChamps	October 2010
Practical Nursing Pinning Ceremony 2010	\$500	\$289.60	Lynne Hancock	July 2010
Residential Electrical Wiring and Coding JobsNOW 12 in 6	\$1,000	\$1,000.00	Gary Saunders	June 2010
Recognition plaques for outstanding student achievement	\$180	\$162.37	Mary Chesson	April 2010
Travel to PA for Forestry Club	\$500	\$500.00	Mike Thompson	January 2010
Diversity Team	\$500	\$500.00	Kiera DesChamps	October 2009
Annual NRA Show	\$500	\$500.00	Bernauer, Adams, Faga	October 2009
Reimbursement for required professional faculty upgrade/development	\$500	\$500.00	Mary Chesson	July 2009
Christmas Parade Float	\$500	\$500	MCC Student Ambassa	October 2008
MCC Wellness Initiatives	\$500	\$500	Tammy Owens	October 2008
Dramatic presentation of Truman Capote's <i>A Christmas Story</i>	\$400	\$400	Mary Chesson	July 2008
Discover MCC 2008-09	\$500	\$500	Kirk/Chesson	July 2008
Guest Speaker-Monologue on Truman Capote's <i>A Christmas Story</i>	\$200	\$200	Mary Chesson	January 2008
Minority Male Mentoring Program	\$1,000	\$1,000	Margo Gaddy	January 2008
Spray on Alternative Metal Finishes	\$1,000	\$1,000	Wayne Bernauer	April 2007
Child Care for ESL Parents	\$1,000	\$1,000	Andres Hernandez	July 2006
Male Mentoring	\$500	\$500	Harry Brower	April 2006
PRAXIS Software	\$500	\$500	AA Program	October 2005
Practical Nursing (5) Practi-Inject Pads	\$500	\$500	Lynne Hancock	January 2005
Medical Assisting Club national convention	\$400	\$400		July 2004

MCC FOUNDATION, INC.

Mini-Grants to Date

December 31, 2013

As approved by the Foundation Board of Directors
(record to be found in the official minutes)

Name of Project	Amount Approved	Amount Spent	Individual	Date
Curriculum Improvement Project-Early Childhood	\$1,000	\$1,000		January 2004
Basic Law Enforcement Training Equipment	\$976	\$976		January 2004
Ergonomic Safety Matting	\$500	\$500		January 2004
Single-Buck Crosscut Saw for Forestry Club	\$500	\$500		January 2004
Medical Assisting Program-Lifeform Venatch IV Trainers	\$400	\$400	Cyndi Caviness	January 2003
Marketing Team - Campus signage	\$500	\$500		October 2002
Medical Assisting Program-Microscope	\$500	\$500		October 2002

2012-2013 Mini Grants

Budgeted Amount:	MLK Day-On	Amount Remaining
\$3,000		
Approved 10/9/13	\$1,000.00	\$2,000.00
Balance Remaining	\$1,000.00	



Mini-Grant Proposal Application

Name of Project Brownells Gunsmithing Career Fair

Amount of Funding Requested \$500

Does the proposal commit the College to continuing expense beyond the grant period?

Yes _____ No x

Is there funding available in your program or department budget?

Yes _____ No x

Individual submitting proposal Wayne Bernauer

Brief description of grant project:

We will divide the \$500 up evenly among the students attending the Gunsmithing Career Fair. The students will be able to interview for employment opportunities in Gunsmithing. They will also attend seminars on Gunsmithing presented by nationally know experts in the field. The cost of the trip for each student will be approximately \$650 and the grant will help off-set those expenses. The travel dates will be March 30-April 3, 2014

Expected Budget:

Item	Estimated Cost
Flights	\$350
Hotel	\$150
Airport parking and gas	\$50
Meals	\$100
Total	<u>650⁰⁰</u>

Supervisor Wayne Bernauer Date 10/8/13

Vice President [Signature] Date 10-8-13

President [Signature] Date 10/10/13

Submit to respective supervisor, Dean or President (if direct report).

Official Payments

It costs 2.35% of the total charge amount for each credit card transaction.

There is no charge for the web sites

Foundation Credit Card

https://staging.officialpayments.com/pc_entry_cobrand.jsp?productId=74247997228345887071542282743877702

For a \$1,000 payment, the fee would be \$23.50

Golf Event Test Site

https://staging.officialpayments.com/pc_entry_cobrand.jsp?productId=16410849813518323172062480050065478

For a \$100 Hole Sponsorship, the fee would be \$2.35

FRIENDRAISING EVENTS				
	Advertising	Refreshments	Other Fees	
				\$2,000.00
Veterans Day		\$58.05		\$58.05
A Christmas Memory		\$27.76	\$100.00	\$127.76
Balance				\$1,814.19

Donor Appreciation "A Christmas Carol" December 10, 2013

		Foundation	MCC
	Budgeted Amount	\$3,000.00	
	18 Tickets Sold	\$270.00	
Awards (Humanitarian & Fund Raiser of the Year)			
	Things Remembered	\$257.87	
	Food	\$286.79	
	Decorations	\$0.00	
	Entertainment (David Browning)	\$2,000.00	
	Clean Up Fee	\$112.50	
Invitations			
	Envelopes 13 * 6.10 + 13 * 7.04		\$170.82
	Postage 1300 * .48		\$624.00
	TOTAL	\$2,657.16	\$794.82
	UNDER BUDGET	\$612.84	
November 2012	Trailblazer Celebration		\$3,088.37
August 2010	Awards Ceremony and Donor Appreciation Event		\$1,219.96
Feb 2010	2009 Donor Appreciation Event	\$1,949.04	\$642.66
August 2009	Awards Ceremony	\$642.66	

**Montgomery Community College Foundation,
Inc. Evaluation of A Christmas Carol**



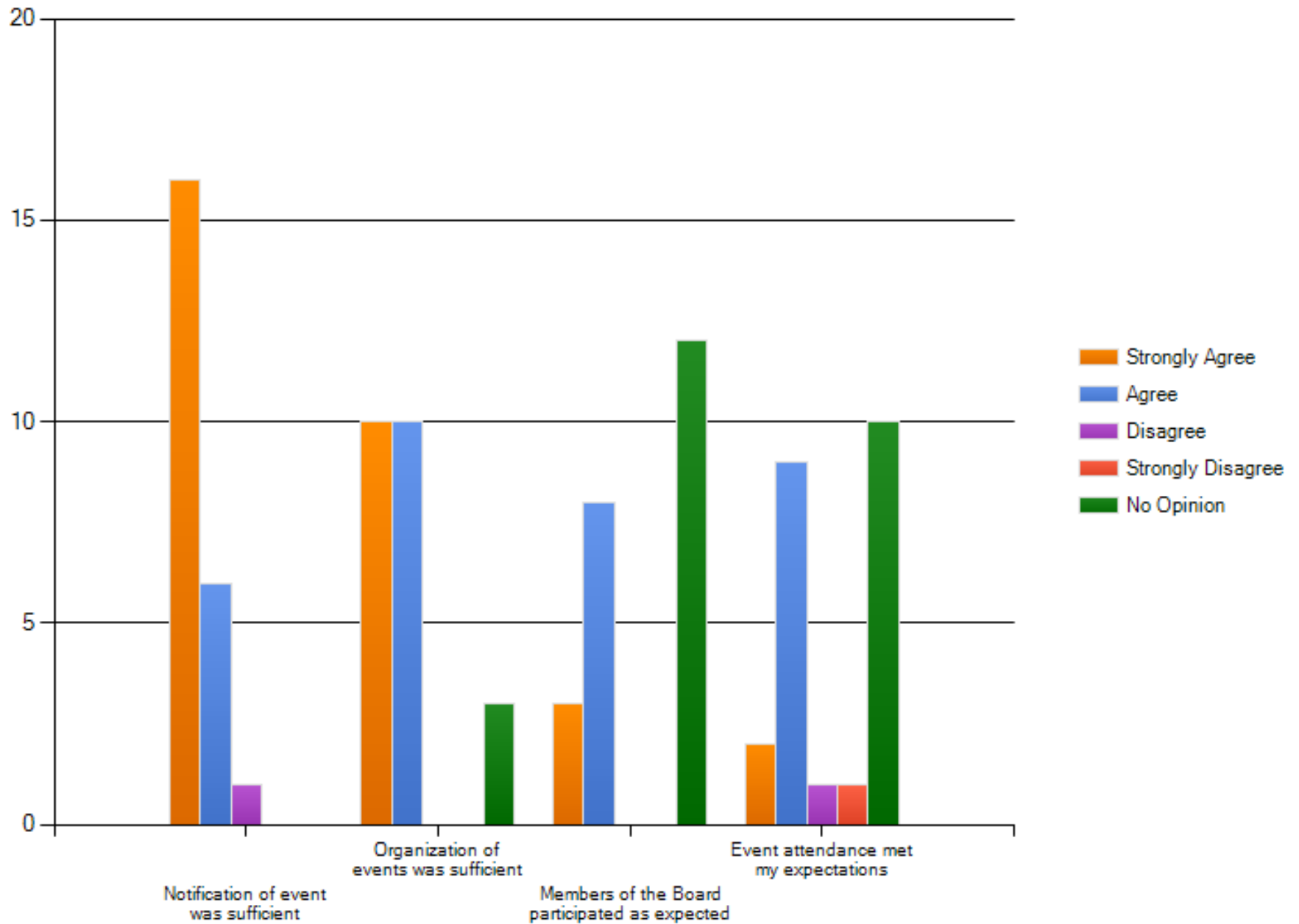
Please rate the following:

	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion	Rating Count
Notification of event was sufficient	69.6% (16)	26.1% (6)	4.3% (1)	0.0% (0)	0.0% (0)	23
Organization of events was sufficient	43.5% (10)	43.5% (10)	0.0% (0)	0.0% (0)	13.0% (3)	23
Members of the Board participated as expected	13.0% (3)	34.8% (8)	0.0% (0)	0.0% (0)	52.2% (12)	23
Event attendance met my expectations	8.7% (2)	39.1% (9)	4.3% (1)	4.3% (1)	43.5% (10)	23
answered question						23
skipped question						0

Page 2, Q1. Suggestions for improvements/explanation of ratings. Please be specific for this event.

1	Unable to attend	Dec 16, 2013 12:16 PM
2	Was fantastic. Lets keep doing this. Maybe really promote it next year.	Dec 16, 2013 9:55 AM
3	Wish you "A Christmas Memory" could be shown at an evening event.	Dec 16, 2013 9:50 AM
4	I think the event was a good idea and wish i had been in town to attend.	Dec 16, 2013 8:58 AM
5	Do not know Board members well enough to address who or how many of them attended. Would have love to seen the venue packed, but feel we advertised and reminded people repeatedly. Short of dragging them to the event, not sure how to get more people to attend. The performer, sorry cannot remember his name, was EXCELLENT! Anyone who did not attend missed a wonderful performance.	Dec 16, 2013 8:12 AM
6	I wish it had been better advertised. I think we could have done a better job with this.	Dec 15, 2013 8:45 PM
7	A shame more people did not accept this gracious invitation. It was a very nice event, well planned and carried out. Perhaps another night of the week would be better, like a Friday.	Dec 15, 2013 2:15 PM
8	I wondered, in the future, if an email could go out a couple of days before the event to those that accepted to remind them of the event. We all get so busy at Christmas and all during the year that a reminder might be appreciated.	Dec 15, 2013 1:49 PM
9	Bring him back for Mayberry event!	Dec 14, 2013 7:24 PM
10	An improvement would be to devise a way to get our donors to attend. It was an excellent event and they don't know what they missed by not attending.	Dec 14, 2013 6:37 PM

Please rate the following:



SAVE THE DATE

Friday, May 2, 2014

For the 16th Annual
Montgomery Community College Foundation
Golf Tournament

**Densons Creek
Golf Course**



January						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

July						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

- Foundation Board Meetings
- MLK Day On Challenge
- January 23, Thursday, Internal AFD Kick Off Lunch
- February 1, Saturday, AFD Kick Off Breakfast
- May 2, Friday, Golf Tournament
- May 14, Wednesday, MCC Graduation
- August TBD, Awards Ceremony
- November 1, Saturday, Raffle & Dinner Show

Annual Fund Drive Comparison of Contributions by Quarter

AFD Goal for 2013: \$175,000 in money received and \$25,000 in pledges

	2013	2012	2011	2010	2009
January - March	\$215,623.37	\$104,689.73	\$36,508.72	\$64,788.52	\$34,410.84
April - June	\$21,545.02	\$65,114.77	\$32,377.99	\$42,634.50	\$35,339.00
July - September	\$27,360.34	\$20,367.30	\$70,434.47	\$50,536.38	\$23,499.00
October - December	\$50,780	\$17,022.46	\$30,992.11	\$66,898.32	\$21,081.00
TOTAL	\$315,308.73	\$207,194.26	\$170,313.29	\$224,857.72	\$114,329.84

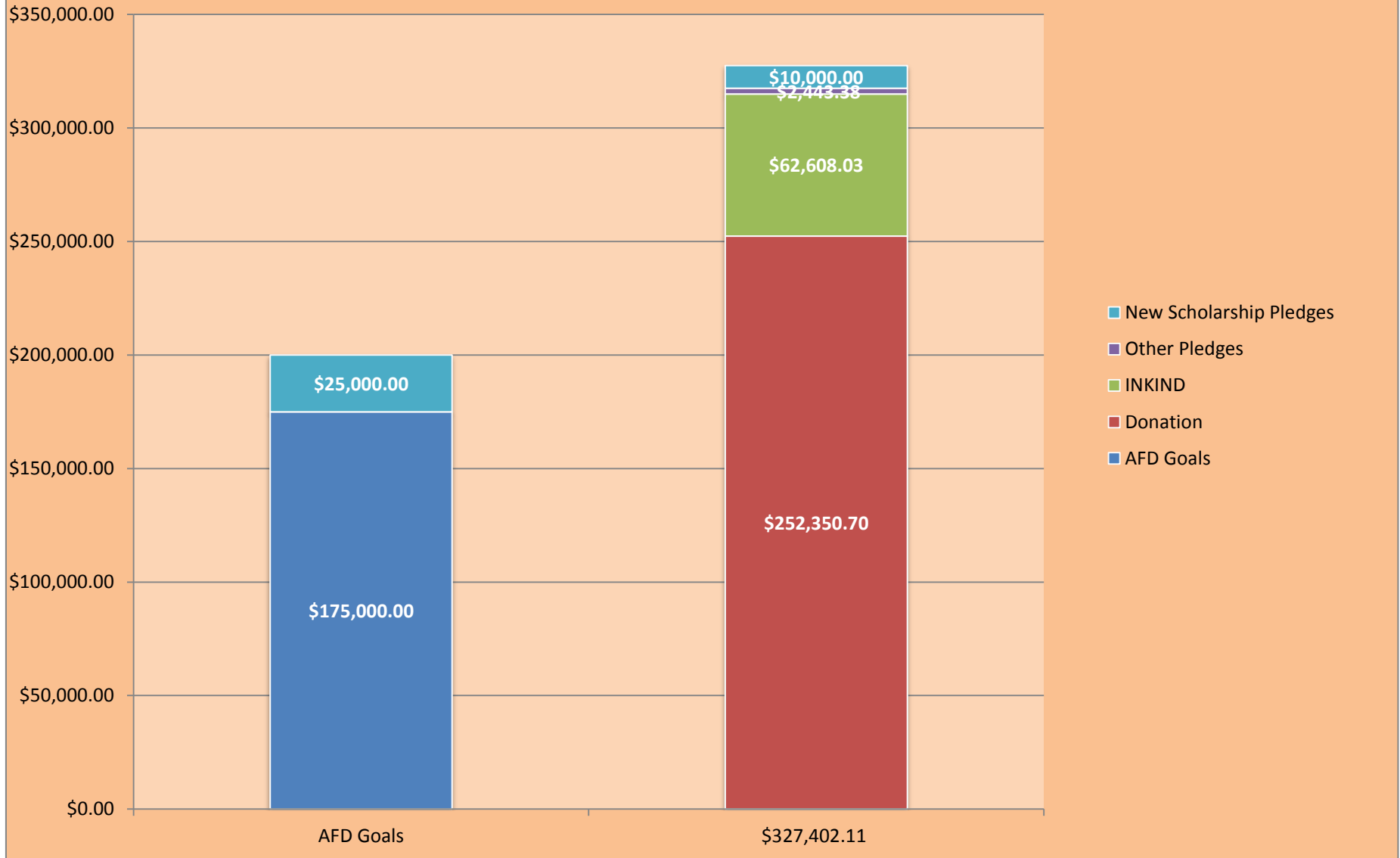
Pledges Made in 2013

Pledged \$10,000 Bill and Dot Bumgarner & Garrett and Carol Parsons Endowed Scholarship from Sherrill Bumgarner

New Scholarships in 2013

\$100,000	MidwayUSA Endowed Firearms Fund
\$10,000	Riley and Marilyn Phillips Endowed Scholarship
\$51,000	Frank Tedder and Edith Whicker Roberts Endowed Scholarship

Annual Fund Drive 2013 Results as of 12/31/13



*There are several ways
you can be someone's
Lucky Star*

*Through our Endowed and
Named Scholarships,
we awarded
65 scholarships in
2013-2014*

**2014 Annual Fund Drive
Pledge Form**

One-time payment enclosed in the amount of: \$ _____

OR

Monthly payroll deduction in the amount of: \$ _____ for _____ months.

You can mark on back the scholarship or fund of your choice

OR write in below

Scholarship / Program Development fund: _____

OR

New fund or scholarship: _____

(Please meet with Foundation Director to develop criteria for fund disbursement.)

Name: _____ Signature: _____ Date: _____

Thank you

Endowed Scholarships, 2013-2014

Madeline and James B. Allen Endowed Scholarship
 Better Burger Endowed Scholarship
 Drs. Joseph Reese Blair and Claudia B. Blair Endowed Scholarship
 Bulthuis Endowed Scholarship
 Pat and Howard Burkart Endowed Scholarship
 Capel Incorporated Endowed Scholarship
 Gelynda T. and Arron W. E. Capel MSP Endowed Scholarship
 Capel, Capel, and Hric MSP Endowed Scholarship
 Earle and Jean Connelly Endowed Scholarship
 Chris Deaton, Jodie Noah, Brandon Simmons and Austin Williams Memorial Endowed Scholarship
 Brady and Joan Dickson Endowed Scholarship
 Win & Elizabeth Dozier Endowed Scholarship
 Matt Ellis Endowed Scholarship
 Blanche Bray Farlowe Endowed Scholarship
 Fidelity Bank Biscoe Branch Endowed Scholarship
 Fidelity Bank Candor Branch Endowed Scholarship
 Fidelity Bank Star Branch Endowed Scholarship
 Fidelity Bank Troy Branch Endowed Scholarship
 First Bank Endowed Scholarship
 First Bank MSP Endowed Scholarships (2)
 FirstHealth of the Carolinas Endowed Scholarship (3)
 First National Bank and Trust Endowed Scholarship (CommunityOne)
 Grady & Alvis Goforth Boy Scouts and Venture Crew Endowment
 Margaret & Herbert C. Green Forestry Endowment
 Growler Group Endowed Scholarship
 Alan Gutschmit Early Childhood Endowed Scholarship
 Wanda and Michael Hamilton Memorial Nursing Endowed Scholarship
 Steve Hamilton Memorial Endowed Scholarship
 Hartley & West Endowment
 Anna Hollers MSP Endowed Scholarship
 Gilbert A. "Sonny" Holt Memorial Nursing Endowed Scholarship
 Samantha B. Hussey Memorial Endowed Scholarship
 William "Billy" H. Johnson, Jr. Memorial Endowed Scholarship
 Jordan Lumber Endowed Scholarship
 Jordan Lumber Endowed MSP Scholarships (2)
 Joan and Frank Kersey Endowed Scholarship
 Mary P. and Charles T. Kirk Endowed Scholarship
 Hilda Lee Endowed Scholarship
 Bill Maness Family Endowed Scholarships
 Brittany C. Maness Honorary Endowed Scholarship

Branson and Lorraine McRae MSP Endowed Scholarship (2)
 Claire Menard Students Helping Students
 MidwayUSA Endowed Firearms Fund
 Montgomery Community College General Endowed Scholarships
 Montgomery Insurance Scholarship Endowment
 Montgomery Motors MSP Endowed Scholarship
 Montgomery Scholars Program (MSP) Endowed Scholarship
 M.W. "Bill" Mullinix, Sr. and Nancy Hulin Mullinix Endowed Scholarship
 Riley and Marilyn Phillips Endowed Scholarship
 Fred H. and Louise A. Powell Endowed Scholarship
 Progress Energy Endowed Scholarship
 Progress Energy MSP Endowed Scholarship
 Jesse T. "Jack" Pugh Memorial Scholarship
 Quik Chek MSP Endowed Scholarship
 Randolph Electric Membership Corporation Endowed Scholarship
 Betty M. Reynolds Endowed Scholarship
 Clay Vance Richardson Memorial Endowed Scholarship
 Brenda Chriscoe Ritter Endowed Scholarship
 Frank Tedder and Edith Whicker Roberts Endowed Scholarship
 J. Paul Russell Endowed Scholarship
 Johnny Russell Endowed Scholarship
 Zane Simmons Endowed Scholarship
 Andy Speer Taxidermy Endowed Scholarship
 Springs Industries Endowed Scholarship
 Kelly Stafford, Emily Hamilton, Stacey Stafford and Daniel Hamilton Honorary Endowed Scholarship
 Stanly Regional Medical Center Endowed Scholarship
 Frederick Leslie Taylor Endowed Scholarship
 Grady G. Thomas Memorial Endowed Scholarship
 Uwharrie Environmental MSP Endowed Scholarship
 Harold and Carolyn VanDerveer Nursing Assistant Scholarship Endowment
 Becky and Eben Wallace CJ Endowed Scholarship
 John and Goldie Wallace Endowed Scholarship
 Willis Endowed Scholarship
 Matthew and Kim Woodard Endowed Scholarship

Named Scholarships, 2013-2014

J. F. and Jean Allen Family Scholarship
 Brownell's Inc. Scholarship
 Business Tech Scholarship
 Gelynda T. Capel Scholarship
 Chi Sigma Club Scholarship
 The Child Study Club Scholarship
 Win & Elizabeth Dozier Named Scholarship
 Grede Scholarship
 Glenn & Lynne Hancock Scholarship
 J. & M. Hickman Scholarship

Dr. Charles Highsmith Nurses Scholarship
 Hunters Helping Kids Named Scholarship
 Morgan Hutchison Scholarship
 Lola S. James Memorial Scholarship
 Alexander Julian Scholarship for Carolina Craft Excellence
 Mr. and Mrs. William B. Landon Scholarship
 Minority Male Mentoring Scholarship
 Mount Gilead Civitan Club Scholarship
 Mount Gilead Lions Club Scholarship
 William (Bill) R. Muse, Jr. Scholarship
 Diane Nelson Scholarship
 Friends of NRA Scholarship
 Woodrow Robinson Scholarship
 Theodore C. Sanders Gunsmithing Scholarship
 Sandhills Dental Assistant Association Scholarship
 Troy Rotary Club Scholarship
 Bruce Turner Continuing Education Scholarship Fund
 Harold & Carolyn VanDerveer Nursing Assistant Named Scholarship

Program and Project Funds

Accounting Program
 Allied Health Building
 Bell Tower
 Career and College Promise
 College Transfer AA Program
 Computer Information Technology Program
 Continuing Education Art Class Assistance
 Cross Cut Saw
 Dental Assisting Program
 Early Childhood Program
 Electrical/Electronics Program
 Employee Memorial Garden
 Entrance Landscaping
 Food Service Technologies
 Forestry Building
 Forest Management Technology Program
 Friends of the Library
 GED Fees Assistance
 General Building Fund
 Gunsmithing Program
 Human Services Program
 HVAC Program
 Medical Assisting Program
 Metal Engraving Program
 Minority Male Mentoring Program
 Multi-Purpose Room Repairs
 Nurse Pinning Ceremony
 Practical Nursing Program
 Office Administration Program
 Office Systems Technology Program
 Pottery Program
 Professional Development Fund
 Testing Center
 Trailblazer Shooting club
 New Shooting Range
 Student Competition Fund
 Student Union / Sports Courts
 Taxidermy Program
 Women of Empowerment Program



**Through our Endowed
and Named Scholarships
we awarded 65 scholarships
for the 2013-2014 academic year**

**Proceeds from our fund
raising events sponsor
mini-grants, continuing
education scholarships and
books for Career and College
Promise high schools students**

**Endowed Scholarships
\$10,000 and Up**

**Named Scholarships
\$1,000 and up**

**2014
Annual Fund
Drive**

**Golf Tournament
May 2, 2014**

**Raffle/Dinner
November 1, 2014**

**There are several
ways you can be
someone's
Lucky Star**

Golf Tournament Sponsorship

- \$100 Hole Sponsorship**
Includes sign on tee box, golf cart & program listing.
- \$440 Team Sponsorship**
Includes tee sign, golf cart & program listing, & four players.
- \$500 Friends of the Foundation**
Includes sign on scoreboard, golf cart & program listing.
- \$1000 Tournament Sponsor**
Includes sign on scoreboard, golf cart & program listing.
- \$2500 Corporate Sponsor**
Includes tournament corporate sponsor banner with name, golf cart & program listing, & four players.

Raffle/Dinner Sponsorship

- \$500** Includes one ticket and banner
- \$1000** Includes two tickets and banner

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