



MONTGOMERY COMMUNITY COLLEGE FOUNDATION

1011 Page Street · Troy, NC 27371 · (910) 980-9603 · eppsl@montgomery.edu

The regular meeting of the Foundation Board of Directors of Montgomery Community College will be held on Wednesday, February 8, 2017 at noon in the College boardroom in Building 200. Lunch will be provided at 11:30 a.m.

Call to Order – Jean Abbott, Foundation President

Approval of the Agenda – Jean Abbott, Foundation President – Action

Welcome – Jean Abbott

Awards Presentation – Jean Abbott

- * Humanitarian of the Year Award – State Employees Credit Union
- * Fundraiser of the Year Award – Mid-South Food Service

Minutes – Jean Abbott

- * November 9, 2016 Foundation Board Minutes – **Appendix A– Action**
- * January 4, 2017 Email Minutes – **Appendix B – Action**

Scholarship Presentation – Doni Hatchel – Financial Aid Director

- * Recommended scholarship changes – **Appendix C- Action**

Finance Committee Report – Jean Abbott

- * Trust Co. of NC 1st Quarter Performance Report – **Appendix D**
- * RFP Process Update

Treasurer Report – Jeanette McBride, Foundation Treasurer

- * Fund Statements – **Appendix E – Action**
- * College and Career Promise Books – **Appendix F**

Foundation Reports – Lynn Epps, Director of Resource Development

- * Budget Review – **Appendix G**
- * MLK Challenge – **Appendix H**
- * Legacy Bricks – **Appendix I**
- * Chili Cook Off – **Appendix J**
- * 2017 Calendar – **Appendix K**
 - o Golf Tournament
 - o Friendraising event -**Action**

Annual Fund Drive, report from Fundraising Committee Chair – Jean Abbott

- * 2016 Annual Fund Drive Cumulative Donations – **Appendix P**
- * 2017 Annual Fund Drive Pledge

President’s Report

New Business

Adjourn

Next Meeting May 10, 2017

**Montgomery Community College Foundation
Board of Directors Meeting
November 9, 2016**

Present: Jean Abbott, Dr. Chad Bledsoe, Claudia Bulthuis, Katie Dunlap, Lynn Epps, Michele Haywood, Lynne Hancock, Bill Hudson, Earl Leake, Jeanette McBride, Maxton McDowell, Sandra Miller, Lynne Russell, Adam Sexton, Jane Van Sinderen, and Korrie Ervin.

Not Present: Richard Cabadas, Anna Hollers, Gary McRae and Kevin Smith

Mrs. Miller called the meeting to order.

Mr. Leake made a motion, seconded by Mrs. Hancock, to approve the November 9, 2016 Board agenda. The motion carried.

Mrs. Miller welcomed Adam Sexton, SGA President.

Mr. Leake made a motion, seconded by Mrs. Van Sinderen, to approve the minutes from the August 10, 2016 Foundation Board Meeting, Finance Committee Meeting and November 4, 2016 Nominating Committee minutes. The motion carried.

Mr. McDowell gave an update on the financial audit. He noted that the financial statements are in good standing. He noted that there were no deficiencies in the internal controls.

The 2016 Baby Scholarship was presented to Ivory Padme Herrera Williams, born on September 15, 2016. She is the daughter of Alicia Herrera and Justice Williams.

Mrs. Bulthuis gave an update from the Nominating Committee. She reported that the committee discussed the membership status of Board members Kevin Smith and Richard Cabadas. Mr. Smith has not responded to any messages since leaving Montgomery Motors earlier this month. Mr. Richard Cabadas has missed at least three consecutive meetings and has asked to resign from the Board. The Nominating Committee approved and Mrs. Bulthuis recommends that the resignation of Richard Cabadas and the removal of Kevin Smith from the MCC Foundation Board of Directors be approved. Coming from committee this required no second. During discussion, it was noted that there were several attempts to contact Mr. Smith with no responses. The motion carried.

The Nominating Committee approved and Mrs. Bulthuis recommends that Jean Abbott be nominated as President of the MCC Foundation Board of the remainder of the 2016-2017 year. The motion carried.

The Nominating Committee approved and Mrs. Bulthuis recommends that Anne Roberts Samsel and Roy Anderson be approved as two new Board members. Coming from committee this required no second. The motion carried. Mrs. Samsel will be filling the term of Richard Cabadas expiring in 2019 and Roy Anderson will be filling the term of Kevin Smith expiring in 2018.

The Nominating Committee approved and Mrs. Bulthuis recommends that the 2016 Humanitarian Award go to the State Employees Credit Union. Coming from committee this required no second. The motion carried.

The Nominating Committee approved and Mrs. Bulthuis recommends that the 2016 Fundraiser of the Year Award go to Mid-South Vending. Coming from committee, this required no second. The motion carried.

Dr. Bledsoe presented Appendix E, the first quarter performance report from the Trust Company of NC. He noted that overall the performance of the investment account was lower than the Dow Jones performance over the past year. Dr. Dunlap expressed concern over the performance of the investment account. It was noted that the Trust Company of NC had been the investment company for the Foundation funds for at least the past five years. Mr. Leake made a motion, seconded by Dr. Dunlap, to pursue the request for proposals for investment firms. The motion carried.

Mrs. McBride presented Appendix F, the Foundation Fund Statements, including balance reports of the Endowed Funds and the STIF funds. She noted that the balances are for the period ending September, 2016, due to the October reports not being provided by the Trust Company of NC. The total net change since July 2016 totals \$16,700. Continuing Education scholarships were paid out of September and the funds received from the Canon Foundation grant for the nursing simulation mannequin lab were disbursed. Mrs. Bulthuis made a motion, seconded by Mr. Leake, to approve the first quarter foundation fund statements. The motion carried.

Mrs. McBride presented Appendix G, the report from College and Career Promise Books program. She noted that enrollment numbers are up the most since Fall 2014. Instructors are encouraged to use the Open Educational Resource for textbook use. The source allows students to view the textbook online with have to purchase the book. This is resulting in a cost savings for the College and Career Promise Book program.

Mrs. Epps presented Appendix H, the Budget Review. She noted that the budget is on track for the year.

Mrs. Epps presented Appendix I, the review of Occupational Scholarships. So far, 47 Continuing Education scholarships have been awarded.

Mrs. Epps presented Appendix J, the financial results of the Starry, Starry Night Raffle. Total revenue was around \$33,000 after expenses, the \$23,500 goal was reached. The event raised additional funds for other clubs and programs on campus totaling \$1,300.

Mrs. Epps presented Appendix K, the survey results of the Starry, Starry Night Raffle. Overall the results were positive for the event. Mrs. Van Sinderen noted how much she appreciated these events in the past and regretted not be able to attend this event. It was noted that there were a lot of great silent auction items at the event.

The last questions of the survey were directed toward the 2017 Raffle event/gala. The results suggested to have the event off campus and allow alcohol at the event, there were several board members that expressed their concern of having alcohol at the event. Following much discussion, Dr. Dunlap made a motion, seconded by Mrs. Van Sinderen, to have the 2017 Raffle event on campus with no alcohol. The motion carried.

The Veterans Day Friendraising event will be tomorrow, November 10 at 11:00 a.m. at the flagpole at center of campus.

Mrs. Epps presented the Appendix M, the recommended revisions to the Montgomery Scholars Scholarship Program. She reported that an issue is developing with high school students who are taking Career and College Promise classes are not needing to attend Montgomery Community College full time to complete their degree. Following discussion, the issue was tabled until the February meeting. It was recommended that specific wording be presented to address the issues for consideration at the February meeting.

Mrs. Epps presented Appendix N, the bell donation structure. She recommended that engraved bricks be sold to create the structure. The proceeds would offset the cost of the structure. Mrs. Abbott made a motion, seconded by Mrs. Bulthuis, to approve the sale of bricks for the bell structure. The motion carried. Mrs. Epps hopes to be able to begin selling the bricks before Christmas.

Mrs. Epps presented Appendix O, the calendar of upcoming events. Dr. Dunlap made a motion, seconded by Mr. Leake, to approve the event dates for 2017. The motion carried.

Mrs. Abbott presented Appendix P, the 2016 Annual Fund Drive contributions. She noted that the goal has already been met for the 2016 year because of the Cannon Foundation grant.

Mr. Hudson gave a report on the possibility of life insurance, annuities with the Foundation as the beneficiary. This option for giving was approved with the recent acceptance of the Gift Policy. There was discussion about adding the sale of these policies into the goals of the Annual Fund Drive for 2017.

Following discussion, Dr. Dunlap made a motion, seconded by Mrs. Abbott to approve the goals for 2017 to be \$125,000, 50 annuities/life insurance policies and two new endowed scholarships. The motion carried.

Dr. Bledsoe reported that the college has an increase in headcount of the previous year. The student union will be renovated to the Center for Workforce Development. The entrance sign is being reconstructed.

The Pottery Christmas Crawl will be December 6-8.

Mr. Leake made a motion, seconded by Mrs. Van Sinderen, to adjourn the meeting.



Montgomery Scholars Exceptions

11 messages

Epps, Lynn <eppsl@montgomery.edu>

Wed, Jan 4, 2017 at 3:40 PM

To: "Jean A. Abbott" <jeanabbott59@gmail.com>, rander07@embarqmail.com, Chad Bledsoe <bledsoec@montgomery.edu>, Claudia Bulthuis <boardchair@montgomery.edu>, Katie Dunlap <kmdunlap@embarqmail.com>, Anna Hollers <annahollers232@gmail.com>, Bill Hudson <bhudson@montgomeryinsurancenc.com>, Earl Leake <edleake@hotmail.com>, "McBride, Jeanette" <mcbridej@montgomery.edu>, Gary McRae <garym@mcraeindustries.com>, Sandra Miller <millersandra051@gmail.com>, Jane Hartley <hartleyej@aol.com>, anne samsel <alwaysanne44@gmail.com>, Lynne Russell <c.lynneatkins@yahoo.com>, Lynne Russell <lynne.russell@edwardjones.com>, Lynne Hancock <hancockl@montgomery.edu>, "Sexton, Adam" <sextona3671@student.montgomery.edu>
Cc: Doni Cody <codyd@montgomery.edu>

Good afternoon and Happy New Year MCC Foundation Board Members!

As we are gearing up for the new semester here on campus, I have encountered some issues with the Montgomery Scholars Scholarship that I am looking to the board for guidance..

As we mentioned at our last meeting students must be enrolled and complete at least 12 hours for the Montgomery Scholars Scholarship. All other scholarships we have do not have this requirement. We have two issues with this that have come up for the Spring semester. While I do not normally like email votes, time is of the essence for these issues and I need an answer before our next meeting.

#1. We have two students who have only 2 classes to complete their degree. There is no reason they need to take an additional 2 classes as they will not transfer to the colleges they plan on attending. (Colleges will only take so many credits). I ask that the board make an exception in these students case.

#2. We have 2 students who signed up for 14 credit hours but only completed 10, and one student who signed up for 13 credit hours and only finished 10. All 3 of these students were new this year and I think were overwhelmed with college. Instead of letting their GPA drop with a class they weren't prepared to take, they dropped the classes in order to keep their GPA higher. In doing so they did not realize they had fallen below the 12 hours for the scholarship. At this time we do not have a system in place to notify us of when a student drops a class to warn them they have fallen below their scholarship rules. Currently none of these have signed up for Spring classes because their scholarship has been pulled. After reviewing their files and discussing with the Financial Aid department, we recommend that they be given an exception and be allowed to continue classes in the spring.

Please respond to both question #1 and #2 with a "yes" or "no" for the vote. I will need at least 7 responses of "yes" to move forward with this action. The Financial Aid Committee will be meeting tomorrow at 10 am to review other appeals and I would like to have an answer to them by then. Classes begin next week.

Thank you in advance for your timely response,
Lynn

—
Lynn S Epps
Montgomery Community College Foundation
Director, Resource Development
[910-576-6222](tel:910-576-6222) ext 209

Gary McRae <garym@mcraeindustries.com>

Wed, Jan 4, 2017 at 3:50 PM

To: "Epps, Lynn" <eppsl@montgomery.edu>

[Question 1-yes](#)

Question 2-yes

Gary

From: Epps, Lynn [mailto:eppsl@montgomery.edu]

Sent: Wednesday, January 04, 2017 3:41 PM

To: Jean A. Abbott <jeanabbott59@gmail.com>; rande07@embarqmail.com; Chad Bledsoe <bledsoec@montgomery.edu>; Claudia Bulthuis <boardchair@montgomery.edu>; Katie Dunlap <kmdunlap@embarqmail.com>; Anna Hollers <annahollers232@gmail.com>; Bill Hudson <bhudson@montgomeryinsurancenc.com>; Earl Leake <edleake@hotmail.com>; McBride, Jeanette <mcbridej@montgomery.edu>; Gary McRae <garym@mcraeindustries.com>; Sandra Miller <miller.sandra051@gmail.com>; Jane Hartley <hartleyej@aol.com>; anne samsel <alwaysanne44@gmail.com>; Lynne Russell <c.lynneatkins@yahoo.com>; Lynne Russell <lynne.russell@edwardjones.com>; Lynne Hancock <hancockl@montgomery.edu>; Sexton, Adam <sextona3671@student.montgomery.edu>

Cc: Doni Cody <codyd@montgomery.edu>

Subject: Montgomery Scholars Exceptions

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Katherine Dunlap <kmdunlap@embarqmail.com>

Wed, Jan 4, 2017 at 3:51 PM

To: "Epps, Lynn" <eppsl@montgomery.edu>, "Jean A. Abbott" <jeanabbott59@gmail.com>, rande07@embarqmail.com, Chad Bledsoe <bledsoec@montgomery.edu>, Claudia Bulthuis <boardchair@montgomery.edu>, Anna Hollers <annahollers232@gmail.com>, Bill Hudson <bhudson@montgomeryinsurancenc.com>, Earl Leake <edleake@hotmail.com>, "McBride, Jeanette" <mcbridej@montgomery.edu>, Gary McRae <garym@mcraeindustries.com>, Sandra Miller <miller.sandra051@gmail.com>, Jane Hartley <hartleyej@aol.com>, anne samsel <alwaysanne44@gmail.com>, Lynne Russell <c.lynneatkins@yahoo.com>, Lynne Russell <lynne.russell@edwardjones.com>, Lynne Hancock <hancockl@montgomery.edu>, "Sexton, Adam" <sextona3671@student.montgomery.edu>
Cc: Doni Cody <codyd@montgomery.edu>

Since we are just getting used to this system, I vote yes on both issues. We can work out the kinks as we go forward, but let's err on the side of students this time.

Katie

Katherine M. Dunlap, PhD, MSW

766 Tarry Church Road, Star NC 27356

910.428.8964; kmdunlap@embarqmail.com

"You want weapons? We're in a library. Books are the best weapon in the world. This room's the greatest arsenal we could have. Arm yourself!" Doctor Who

From: Epps, Lynn [mailto:eppsl@montgomery.edu]

Sent: Wednesday, January 4, 2017 3:41 PM

To: Jean A. Abbott <jeanabbott59@gmail.com>; rander07@embarqmail.com; Chad Bledsoe <bledsoec@montgomery.edu>; Claudia Bulthuis <boardchair@montgomery.edu>; Katie Dunlap <kmdunlap@embarqmail.com>; Anna Hollers <annahollers232@gmail.com>; Bill Hudson <bhudson@montgomeryinsurancenc.com>; Earl Leake <edleake@hotmail.com>; McBride, Jeanette <mcbridej@montgomery.edu>; Gary McRae <garym@mcraeindustries.com>; Sandra Miller <miller.sandra051@gmail.com>; Jane Hartley <hartleyej@aol.com>; anne samsel <alwaysanne44@gmail.com>; Lynne Russell <c.lynneatkins@yahoo.com>; Lynne Russell <lynne.russell@edwardjones.com>; Lynne Hancock <hancockl@montgomery.edu>; Sexton, Adam <sextona3671@student.montgomery.edu>

Cc: Doni Cody <codyd@montgomery.edu>

Subject: Montgomery Scholars Exceptions

Good afternoon and Happy New Year MCC Foundation Board Members!

[Quoted text hidden]

Russell, Lynne A <Lynne.Russell@edwardjones.com>

Wed, Jan 4, 2017 at 3:55 PM

To: "Epps, Lynn" <eppsl@montgomery.edu>

Hello Lynn,

#1: Yes, please grant the exception

#2: Yes, please grant the exception with the stipulation they will not be allowed another exception of similar nature in the future.

Have a great day!

Lynne Russell

Lynne Russell
Branch Office Administrator
Edward Jones
429 N Main St Suite A
Troy, NC 27371-2743
(910) 576-7000
www.edwardjones.com

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From:
Sent: Wednesday, January 04, 2017 3:40 PM
To:
Cc:
Subject: Montgomery Scholars Exceptions

[Quoted text hidden]

Sexton, Adam <sextona3671@student.montgomery.edu>
To: "Epps, Lynn" <eppsl@montgomery.edu>

Wed, Jan 4, 2017 at 3:57 PM

Mrs. Epps,
Below are my votes:
#1 yes
#2 yes

v/r

Adam D. Sexton
C: (910) 584-7200
H: (910) 904-0855
sextona3671@student.montgomery.edu
adam.d.sexton64@gmail.com

[Quoted text hidden]

MCC Email <hancockl@montgomery.edu>
To: "Epps, Lynn" <eppsl@montgomery.edu>

Wed, Jan 4, 2017 at 4:25 PM

Cc: "Jean A. Abbott" <jeanabbott59@gmail.com>, rander07@embarqmail.com, Chad Bledsoe <bledsoec@montgomery.edu>, Claudia Bulthuis <boardchair@montgomery.edu>, Katie Dunlap <kmdunlap@embarqmail.com>, Anna Hollers <annahollers232@gmail.com>, Bill Hudson <bhudson@montgomeryinsurancenc.com>, Earl Leake <edleake@hotmail.com>, "McBride, Jeanette" <mcbridej@montgomery.edu>, Gary McRae <garym@mcraindustries.com>, Sandra Miller <miller.sandra051@gmail.com>, Jane Hartley <hartleyej@aol.com>, anne samsel <alwaysanne44@gmail.com>, Lynne Russell <c.lynneatkins@yahoo.com>, Lynne Russell <lynne.russell@edwardjones.com>, "Sexton, Adam" <sextona3671@student.montgomery.edu>, Doni Cody <codyd@montgomery.edu>

Yes to both # 1 & # 2.

Lynne Hancock

Sent from my iPhone
[Quoted text hidden]

McBride, Jeanette <mcbridej@montgomery.edu>
To: "Epps, Lynn" <eppsl@montgomery.edu>

Wed, Jan 4, 2017 at 5:18 PM

Yes to #1 and #2
[Quoted text hidden]

—
"Strengthening the online student learning environment at Montgomery Community College"

Jeanette McBride
V.P. - Administrative Services
Montgomery Community College

Earl Leake <edleake@hotmail.com>

Thu, Jan 5, 2017 at 5:47 AM

To: "Epps, Lynn" <eppsl@montgomery.edu>, "Jean A. Abbott" <jeanabbott59@gmail.com>, "rander07@embarqmail.com" <rander07@embarqmail.com>, Chad Bledsoe <bledsoec@montgomery.edu>, Claudia Bulthuis <boardchair@montgomery.edu>, Katie Dunlap <kmdunlap@embarqmail.com>, Anna Hollers <annahollers232@gmail.com>, Bill Hudson <bhudson@montgomeryinsurancenc.com>, "McBride, Jeanette" <mcbridej@montgomery.edu>, Gary McRae <garym@mcraeindustries.com>, Sandra Miller <millersandra051@gmail.com>, Jane Hartley <hartleyej@aol.com>, anne samsel <alwaysanne44@gmail.com>, Lynne Russell <c.lynneatkins@yahoo.com>, Lynne Russell <lynne.russell@edwardjones.com>, Lynne Hancock <hancockl@montgomery.edu>, "Sexton, Adam" <sextona3671@student.montgomery.edu>
Cc: Doni Cody <codyd@montgomery.edu>

Good morning Lynn,

I vote yes for both exceptions and hopefully we can discuss at our next board meeting, the 12 hours requirement.

Take care,

Earl

From: Epps, Lynn <eppsl@montgomery.edu>

Sent: Wednesday, January 4, 2017 3:40 PM

To: Jean A. Abbott; rander07@embarqmail.com; Chad Bledsoe; Claudia Bulthuis; Katie Dunlap; Anna Hollers; Bill Hudson; Earl Leake; McBride, Jeanette; Gary McRae; Sandra Miller; Jane Hartley; anne samsel; Lynne Russell; Lynne Russell; Lynne Hancock; Sexton, Adam

Cc: Doni Cody

Subject: Montgomery Scholars Exceptions

[Quoted text hidden]

Jean Abbott <jeanabbott59@gmail.com>

Thu, Jan 5, 2017 at 7:12 AM

To: Katherine Dunlap <kmdunlap@embarqmail.com>

Cc: "Epps, Lynn" <eppsl@montgomery.edu>, rander07@embarqmail.com, Chad Bledsoe <bledsoec@montgomery.edu>, Claudia Bulthuis <boardchair@montgomery.edu>, Anna Hollers <annahollers232@gmail.com>, Bill Hudson <bhudson@montgomeryinsurancenc.com>, Earl Leake <edleake@hotmail.com>, "McBride, Jeanette" <mcbridej@montgomery.edu>, Gary McRae <garym@mcraeindustries.com>, Sandra Miller <millersandra051@gmail.com>, Jane Hartley <hartleyej@aol.com>, anne samsel <alwaysanne44@gmail.com>, Lynne Russell <c.lynneatkins@yahoo.com>, Lynne Russell <lynne.russell@edwardjones.com>, Lynne Hancock <hancockl@montgomery.edu>, "Sexton, Adam" <sextona3671@student.montgomery.edu>, Doni Cody <codyd@montgomery.edu>

Lynn. Hello from the mountains. I vote yes on both issues. We're here to facilitate further education for our students.
Jean

Sent from my iPhone

[Quoted text hidden]

Bulthuis, Claudia <boardchair@montgomery.edu>
To: Lynn Epps <eppsl@montgomery.edu>

Thu, Jan 5, 2017 at 7:37 AM

Yes to both.

[Quoted text hidden]

Anna Hollers <annahollers232@gmail.com>
To: "Epps, Lynn" <eppsl@montgomery.edu>

Thu, Jan 5, 2017 at 1:46 PM

I approve your recommendations.

Anna

Sent from my iPhone

Anna

[Quoted text hidden]

Recommended Scholarship Alignment

Federal Pell / State Aid

- 2.0 GPA Cumulative
- 67% Completion Rate Cumulative
- Satisfactory Academic Progress (SAP) Compliant

- ⇒ If not in good standing for one semester, they are moved to Warning.
- ⇒ After warning semester, if they do not meet min requirements they are moved to Unsatisfactory and Suspended.
- ⇒ Student may appeal. If approved they are put on a corrective plan that last until they become SAP compliant again OR until the graduate.

If they fail to meet conditions of appeal student is terminated until they meet SAP compliant at their own expense.

MCC Foundation Scholarships

- 1 year scholarship
- 2.5 GPA Term of the cumulative
- 75% Completion Rate Term of the cumulative
- EFC Range 5001-13,500
- SAP Compliant *Includes all credits included in a Student's academic history

- ⇒ If students do not meet min cumulative requirements, aid is removed
- ⇒ Student may appeal. If approved student is paid for the following term.
- ⇒ If not approved or does not appeal, option to reapply for the following year if in EFC range and SAP compliant.

Montgomery Scholars Scholarships

- 2 year scholarship
- 2.0 GPA Cumulative
- 67% Completion Rate Cumulative
- Student must enroll at MCC in curriculum program the year of high school graduation.
- Not qualified for any other Federal/ State aid
- Must complete 12 hours each term
- SAP compliant *Includes all credits included in a Student's academic history.

⇒ No appeal process. Aid is removed

Recommendations:

- 2.0 GPA per semester
- 67% Completion Rate per semester
- No Minimum hours required for Montgomery Scholars.

Recommendations:

- ⇒ If student does not meet minimum requirements, student receive a Warning semester.
- ⇒ After warning semester, if the student does not meet minimum requirements student is Terminated and Aid is removed.
- ⇒ No appeal process. Student is terminated until they become SAP complainant at their own expense then they may be reconsidered for MCC Foundation scholarship only.



MONTGOMERY COMMUNITY COLLEGE FOUNDATION INVESTMENT MANAGEMENT AGENCY

Fiscal Year End: 12/31

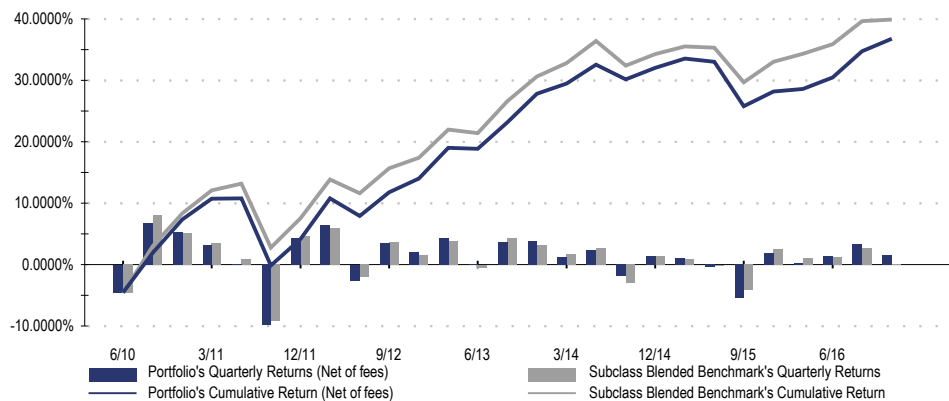
FOR THE PERIOD ENDING: DECEMBER 31, 2016

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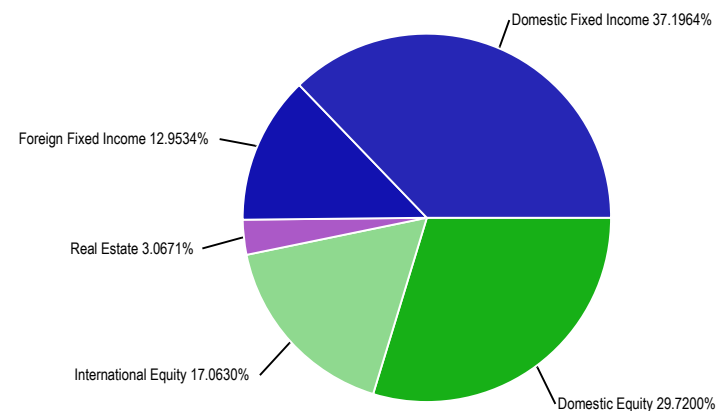
TOTAL PORTFOLIO SUMMARY - REPORT PERIOD: 4/1/10 TO 12/31/16

MONTGOMERY C C FOUNDATION IMA

PORTFOLIO RETURNS



ALLOCATION (BY CLASS)



PORTFOLIO SUMMARY

	LAST MONTH	LAST 12 MONTHS	LAST 3 YEARS ¹	LAST 5 YEARS ¹	REPORT PERIOD ¹
Beginning Value ²	2,806,593	2,698,059	2,710,076	2,045,238	1,810,813
Net Contributions & Withdrawals	5,547	-25,016	-46,592	136,606	293,950
Fees	1,617	22,608	72,463	114,314	145,446
Investment Gain or Loss ²	41,774	201,863	261,277	784,767	892,979
Ending Value ²	2,852,297	2,852,297	2,852,297	2,852,297	2,852,297
TOTAL PORTFOLIO (Net of fees)	1.4295%	6.6934%	2.2814%	5.5926%	4.7494%
<i>Subclass Blended Benchmark</i>	<i>1.1992%</i>	<i>5.1795%</i>	<i>2.3176%</i>	<i>5.4010%</i>	<i>5.1000%</i>

¹ Annualized Return

² Values include Accrued Income.

TOTAL PORTFOLIO ALLOCATION - REPORT PERIOD: 4/1/10 TO 12/31/16

MONTGOMERY C C FOUNDATION IMA

MACRO	CLASS	SUBCLASS	BEGINNING MARKET VALUE ¹	NET CONTRIBUTIONS/ WITHDRAWALS	NET GAIN/ LOSS ¹	ACCRUALS	ENDING MARKET VALUE ¹	CURRENT PORTFOLIO ALLOCATION
EQUITY			834,564	-178,374	678,202	-	1,334,393	46.7831%
	Domestic Equity		562,809	-297,069	581,964	-	847,704	29.7200%
		Large Cap Growth Funds	-	329,298	9,988	-	339,286	11.8952%
		Large Cap Value Funds	187,610	-39,602	218,780	-	366,788	12.8594%
		Small Cap Growth Funds	-	68,008	3,125	-	71,134	2.4939%
		Small Cap Value Funds	-	60,457	10,040	-	70,497	2.4716%
	International Equity		271,756	118,695	96,238	-	486,689	17.0630%
		Developed Large Cap	90,483	225,277	26,363	-	342,123	11.9947%
		Developed Small Cap	44,689	11,491	30,462	-	86,641	3.0376%
		Emerging Market Equities	64,382	-15,114	8,656	-	57,924	2.0308%
FIXED INCOME			879,430	427,351	123,641	2,498	1,430,422	50.1498%
	Foreign Fixed Income	World Bond	418,875	-114,665	65,260	-	369,469	12.9534%
	Domestic Fixed Income		460,555	542,016	58,381	2,498	1,060,953	37.1964%
		US Government	208,465	-122,108	27,999	218	114,355	4.0092%
		US Government-Treasury	-	56,244	802	50	57,047	2.0000%
		Short Bond	209,045	228,784	19,730	715	457,559	16.0418%
		Intermediate Bond	-	112,903	3,267	1,119	116,170	4.0728%
		Nontraditional Bond	-	250,523	6,388	381	256,911	9.0071%
		Taxable Money Market	43,045	15,671	195	15	58,912	2.0654%
REAL ESTATE			96,819	-100,473	91,136	-	87,482	3.0671%
	Real Estate		96,819	-100,473	91,136	-	87,482	3.0671%
		Domestic	96,819	-129,199	90,684	-	58,304	2.0441%
		International	-	28,727	452	-	29,179	1.0230%
TOTAL PORTFOLIO			1,810,813	293,950	892,979	2,498	2,852,297	100.0000%

¹ Values include Accrued Income.

TOTAL PORTFOLIO PERFORMANCE - REPORT PERIOD: 4/1/10 TO 12/31/16

MONTGOMERY C C FOUNDATION IMA

MACRO	SUBCLASS	ENDING MARKET VALUE ²	CURRENT PORTFOLIO ALLOCATION	LAST MONTH	LAST 3 MONTHS	LAST 12 MONTHS	LAST 3 YEARS ¹	LAST 5 YEARS ¹	REPORT PERIOD ¹
EQUITY		1,334,393	46.7831%	2.1572%	3.7937%	11.6496%	3.8538%	12.0258%	9.2974%
	Large Cap Growth Funds	339,286	11.8952%	1.0861%	-0.4174%	6.1301%	2.3726% ³	2.3726% ³	2.3726% ³
	<i>Russell 1000 Growth Index</i>			1.2380%	1.0115%	7.0766%	4.6877% ³	4.6877% ³	4.6877% ³
	Large Cap Value Funds	366,788	12.8594%	2.4802%	8.6243%	18.8505%	8.4900%	16.9339%	13.2536%
	<i>Russell 1000 Value Index</i>			2.4992%	6.6762%	17.3399%	8.5852%	14.7989%	12.1249%
	Small Cap Growth Funds	71,134	2.4939%	0.6390%	1.4207%	10.7395%	-0.0161% ³	-0.0161% ³	-0.0161% ³
	<i>Russell 2000 Growth Index</i>			1.3641%	3.5700%	11.3187%	1.7440% ³	1.7440% ³	1.7440% ³
	Small Cap Value Funds	70,497	2.4716%	3.3565%	15.0038%	28.1872%	8.2539% ³	8.2539% ³	8.2539% ³
	<i>Russell 2000 Value Index</i>			4.1294%	14.0737%	31.7409%	10.1334% ³	10.1334% ³	10.1334% ³
	Developed Large Cap	342,123	11.9947%	3.0723%	3.1320%	6.6408%	-1.9564%	6.2315%	2.9752%
	<i>MSCI EAFE Net Index</i>			3.4195%	-0.7135%	1.0001%	-1.6032%	6.5333%	3.8196%
	Developed Small Cap	86,641	3.0376%	2.4346%	-2.0536%	5.2855%	2.3184%	10.1630%	7.3624%
	<i>MSCI EAFE Small Cap (Net)</i>			2.8655%	-2.8550%	2.1825%	2.1015%	10.5555%	7.3814%
	Emerging Market Equities	57,924	2.0308%	0.4465%	-0.9619%	19.8357%	0.3813%	3.8327%	1.5297%
	<i>MSCI Emerging Mkts Index-Net</i>			0.2208%	-4.1646%	11.1869%	-2.5544%	1.2764%	0.1325%
FIXED INCOME		1,430,422	50.1498%	0.6582%	0.0158%	3.6978%	1.4101%	1.2337%	1.5431%
	World Bond	369,469	12.9534%	1.5728%	2.5897%	3.9375%	1.1572%	0.9922%	1.0183%
	<i>BBG BARC 1-3 Global Aggregate Index</i>			-0.5433%	-4.7689%	0.0423%	-2.9310%	-1.6907%	-0.5280%
	US Government	114,355	4.0092%	-0.0022%	-0.9541%	1.1798%	1.1889% ³	0.9219% ³	1.7228% ³
	<i>BBG BARC 1-3 Year Govt Index</i>			0.0281%	-0.4491%	0.8665%	0.7160% ³	0.5973% ³	0.9356% ³
	US Government-Treasury	57,047	2.0000%	0.1056%	-0.6673%	1.1463%	0.6852% ³	0.6852% ³	0.6852% ³
	<i>BBG BARC 1-3 Year Treasury Index</i>			0.0283%	-0.4566%	0.8625%	0.5088% ³	0.5088% ³	0.5088% ³
	Short Bond	457,559	16.0418%	0.0685%	-0.9828%	2.7972%	1.0484%	0.8830%	0.8550%
	<i>BBG BARC 1-3 Year Aggregate Bond Index</i>			0.0599%	-0.3762%	1.3074%	0.9053%	0.9371%	1.1944%
	Intermediate Bond	116,170	4.0728%	0.4088%	-2.6677%	3.7292%	1.1778% ³	1.1778% ³	1.1778% ³
	<i>BBG BARC Aggregate Bond Index</i>			0.1410%	-2.9755%	2.6475%	0.7931% ³	0.7931% ³	0.7931% ³
	Nontraditional Bond	256,911	9.0071%	1.1672%	1.3227%	6.7133%	1.2099% ³	1.2099% ³	1.2099% ³
	<i>BBA LIBOR USD 3 Month</i>			0.0830%	0.2334%	0.7590%	0.5840% ³	0.5840% ³	0.5840% ³
	Taxable Money Market	58,912	2.0654%	0.0304%	0.0620%	0.2273%	0.0848%	0.0559%	0.0494%
	<i>BBG BARC 3 Month Treasury Bellwether Index</i>			0.0426%	0.0867%	0.3463%	0.1564%	0.1354%	0.1344%

¹ Annualized Return

² Values include Accrued Income.

³ Assets held less than the column period.

TOTAL PORTFOLIO PERFORMANCE - REPORT PERIOD: 4/1/10 TO 12/31/16

MONTGOMERY C C FOUNDATION IMA

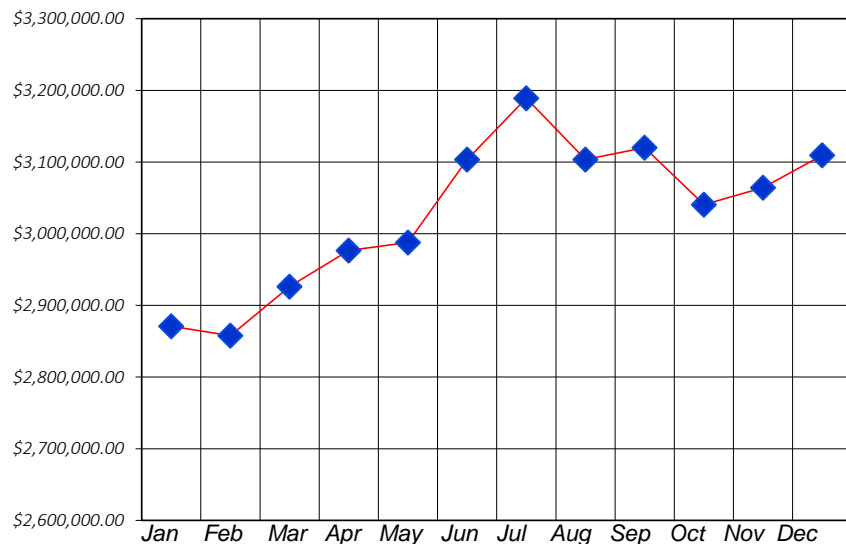
MACRO	SUBCLASS	ENDING MARKET VALUE ²	CURRENT PORTFOLIO ALLOCATION	LAST MONTH	LAST 3 MONTHS	LAST 12 MONTHS	LAST 3 YEARS ¹	LAST 5 YEARS ¹	REPORT PERIOD ¹
REAL ESTATE		87,482	3.0671%	3.4024%	-5.5310%	6.5912%	12.1380%	10.9295%	11.9019%
	Domestic	58,304	2.0441%	3.7238%	-4.0090%	8.3590%	13.6304%	11.8129%	12.5613%
	<i>FTSE NAREIT All Equity REIT Index</i>			4.4628%	-3.2766%	8.6288%	12.6632%	11.9785%	12.5200%
	International	29,179	1.0230%	2.8248%	-8.5594%	3.2394%	-2.9225% ³	-2.9225% ³	-2.9225% ³
	<i>FTSE EPRA/NAREIT Developed ex US Index</i>			1.1485%	-7.6917%	1.7625%	-2.8939% ³	-2.8939% ³	-2.8939% ³
TOTAL PORTFOLIO (Net of fees)		2,852,297	100.0000%	1.4295%	1.5171%	6.6934%	2.2814%	5.5926%	4.7494%
	<i>Subclass Blended Benchmark</i>			1.1992%	0.1840%	5.1795%	2.3176%	5.4010%	5.1000%

¹ Annualized Return² Values include Accrued Income.³ Assets held less than the column period.

Montgomery Community College Foundation Funds Statement FY 2016-2017

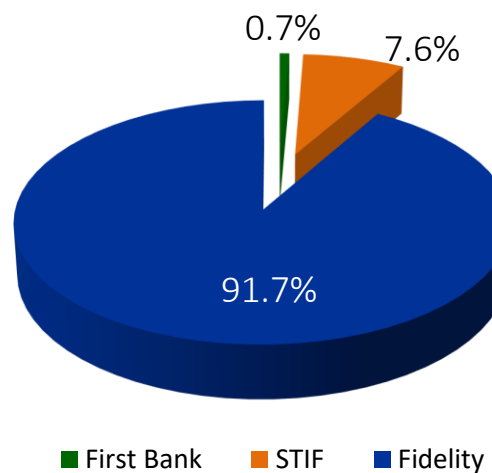
	Fiscal Year To Date 7/1/2016 thru 6/30/2017				Month of December 2016			
	Trust Co. of NC	STIF	First Bank	Total	Trust Co. of NC	STIF	First Bank	Total
Beginning Value	\$2,742,627.59	\$242,843.84	\$117,963.19	\$3,103,434.62	\$2,804,479.08	\$236,995.01	\$22,833.36	\$3,064,307.45
Receipts								
Interest/Gains	\$41,536.62	\$1,310.76	\$2.73	\$42,850.11	\$14,801.44	\$192.77	\$0.43	\$14,994.64
Deposits	\$14,212.05	\$121,729.96	\$65,508.70	\$201,450.71	\$5,547.32	\$1,375.96	\$8,339.94	\$15,263.22
Total Receipts	\$55,748.67	\$123,040.72	\$65,511.43	\$244,300.82	\$20,348.76	\$1,568.73	\$8,340.37	\$30,257.86
Disbursements								
Withdrawals/Fees	\$59,905.96	\$128,379.43	\$161,375.26	\$349,660.65	\$1,617.27	\$1,058.61	\$9,074.37	\$11,750.25
Total Disbursements	\$59,905.96	\$128,379.43	\$161,375.26	\$349,660.65	\$1,617.27	\$1,058.61	\$9,074.37	\$11,750.25
Market Value Net Change	\$111,329.13	\$0.00	\$0.00	\$111,329.13	\$26,588.86	\$0.00	\$0.00	\$26,588.86
Ending Value	\$2,849,799.43	\$237,505.13	\$22,099.36	\$3,109,403.92	\$2,849,799.43	\$237,505.13	\$22,099.36	\$3,109,403.92
Net Change	\$107,171.84	(\$5,338.71)	(\$95,863.83)	\$5,969.30	\$45,320.35	\$510.12	(\$734.00)	\$45,096.47

Foundation Funds Value



Jul 2016 - Jun 2017

Foundation Funds Distribution



ENDOWED Balance
As of December 31, 2016

Appendix E

Fund Name	Sep 2016 Balance	Oct 2016 Contributions	Oct 2016 Expenses	Oct 2016 Inv. Gains/Losses	Oct 2016 Balance	Nov 2016 Contributions	Nov 2016 Expenses	Nov 2016 Inv. Gains/Losses	Nov 2016 Balance	Dec 2016 Contributions	Dec 2016 Expenses	Dec 2016 Inv. Gains/Losses	Dec 2016 Balance
Interest(Gain/Loss less Contributions)				(21,610.30)				28,581.77				39,773.03	
Alan Gutschmit Early Childhood Endowed Scholarship	13,458.81			(103.99)	13,354.82			137.51	13,492.33			190.97	13,683.30
American Custom Gunmakers Guild Education Foundation Scholarship	23,273.34			(179.82)	23,093.52			237.78	23,331.30			330.23	23,661.53
Andy Speer Taxidermy Endowed Scholarship	4,553.32	115.00		(36.07)	4,632.25	115.00		48.88	4,796.13	115.00		69.51	4,980.64
Anna Hollers Montgomery Scholars Program Endowed Scholarship	15,828.68			(122.30)	15,706.38			161.72	15,868.10			224.60	16,092.70
Becky W. and Eben R. Wallace, Jr. Criminal Justice Endowed Scholarship	15,391.97			(118.93)	15,273.04			157.26	15,430.30			218.40	15,648.70
Better Burger Endowed Scholarship	13,196.99			(101.97)	13,095.02			134.83	13,229.85			187.25	13,417.10
Betty M. Reynolds Endowed Scholarship	4,618.64			(35.69)	4,582.95			47.19	4,630.14			65.53	4,695.67
Bill and Patsy Maness Family Endowed Scholarship (2)	22,788.29		500.00	(172.21)	22,116.08			227.72	22,343.80			316.25	22,660.05
Blanche Bray Farlowe Endowed Scholarship	12,623.52			(97.54)	12,525.98			128.97	12,654.95			179.12	12,834.07
Brady and Joan Dickson Endowed Scholarship	18,904.01			(146.06)	18,757.95			193.14	18,951.09			268.23	19,219.32
Branson and Lorraine McRae Montgomery Scholars Program Endowed Scholarships	37,479.61			(289.59)	37,190.02			382.92	37,572.94			531.81	38,104.75
Brenda Chriscoe Ritter Endowed Scholarship	11,073.60			(85.56)	10,988.04			113.14	11,101.18			157.13	11,258.31
Brittany C. Maness Honorary Endowed Scholarship	12,253.57			(94.68)	12,158.89			125.19	12,284.08			173.87	12,457.95
Bulthuis Endowed Scholarship	15,838.71	10.00		(122.45)	15,726.26	10.00		162.03	15,898.29	10.00		225.17	16,133.46
Capel Incorporated Endowed Scholarship	55,312.11			(427.37)	54,884.74			565.12	55,449.86			784.84	56,234.70
Capel, Capel, and Hric Montgomery Scholars Program Endowed Scholarship	19,960.15			(154.22)	19,805.93			203.93	20,009.86	150.00		285.34	20,445.20
Chris Deaton, Jodie Noah, Brandon Simmons and Austin Williams Memorial Endowed Scholarship	18,679.24			(144.32)	18,534.92			190.84	18,725.76			265.04	18,990.80
Claire Menard Students Helping Students Endowment	11,916.30			(92.07)	11,824.23			121.75	11,945.98			169.08	12,115.06
Clay Vance Richardson Memorial Endowed Scholarship	13,339.45			(103.07)	13,236.38			136.29	13,372.67			189.28	13,561.95
Kelly Stafford, Emily Hamilton, Stacey Stafford and Daniel Hamilton Honorary Endowed Scholarship	11,149.61			(86.15)	11,063.46			113.91	11,177.37			158.20	11,335.57
Drs. Joseph Reese Blair and Claudia B. Blair Endowed Scholarship	56,229.37			(434.46)	55,794.91			574.49	56,369.40			797.85	57,167.25
DTE Energy Endowed Scholarship	10,073.53			(77.83)	9,995.70			102.92	10,098.62			142.94	10,241.56
Earle and Jean Connelly Scholarship Endowment	48,793.50			(377.00)	48,416.50			498.52	48,915.02	1,700.00		716.40	51,331.42
Fidelity Bank Biscoe Branch Endowed Scholarship	14,053.15		250.00	(106.65)	13,696.50			141.02	13,837.52			195.86	14,033.38
Fidelity Bank Candor Branch Endowed Scholarship	14,314.08		250.00	(108.67)	13,955.41			143.69	14,099.10			199.56	14,298.66
Fidelity Bank Star Branch Endowed Scholarship	19,172.81		250.00	(146.21)	18,776.60			193.33	18,969.93			268.50	19,238.43
Fidelity Bank Troy Branch Endowed Scholarship	14,053.15		250.00	(106.65)	13,696.50			141.02	13,837.52			195.86	14,033.38
First Bank Endowed Scholarship	49,800.88			(384.79)	49,416.09			508.81	49,924.90			706.64	50,631.54
First Bank Montgomery Scholars Program Endowed Scholarship	18,113.86			(139.96)	17,973.90			185.07	18,158.97			257.02	18,415.99
First Bank Montgomery Scholars Program Endowed Scholarship 2	19,429.07			(150.12)	19,278.95			198.50	19,477.45			275.68	19,753.13

ENDOWED Balance
As of December 31, 2016

Appendix E

FirstHealth of the Carolinas Endowed Scholarships	72,697.78	(561.70)	72,136.08	742.74	72,878.82		1,031.52	73,910.34
CommunityOne Bank Endowed Scholarship (First National Bank and Trust Endowed Scholarship)	13,439.80	(103.84)	13,335.96	137.31	13,473.27		190.70	13,663.97
Fred H. and Louise A. Powell Endowed Scholarship	13,567.53	(104.83)	13,462.70	138.62	13,601.32		192.51	13,793.83
Frederick Leslie Taylor Memorial Endowed Scholarship	22,373.75	(172.87)	22,200.88	228.59	22,429.47		317.47	22,746.94
Friedman Blair Endowed Scholarship	10,303.08	(79.61)	10,223.47	105.27	10,328.74		146.19	10,474.93
Gelynda T. and Arron W. E. Capel Montgomery Scholars Program Endowed Scholarship	25,854.35	(199.76)	25,654.59	264.15	25,918.74	1,000.00	381.01	27,299.75
Gilbert "Sonny" A. Holt Memorial Nursing Scholarship Endowment	17,273.23	(133.46)	17,139.77	176.48	17,316.25		245.09	17,561.34
Gordon & Susan Knowles Endowed Scholarship	10,554.71	(81.55)	10,473.16	107.84	10,581.00		149.76	10,730.76
Grady and Alvis Goforth Boy Scouts and Venture Crew Endowed Scholarship	11,081.23	(85.62)	10,995.61	113.22	11,108.83		157.23	11,266.06
Grady G. Thomas Memorial Endowed Scholarship	36,061.30	(278.63)	35,782.67	368.43	36,151.10		511.68	36,662.78
Grede Endowed Scholarship	15,349.63	(118.60)	15,231.03	156.82	15,387.85		217.80	15,605.65
Growler Group Endowed Scholarship	36,928.82	(285.33)	36,643.49	377.30	37,020.79		523.99	37,544.78
Hartley & West Memorial Endowment	11,364.46	(87.81)	11,276.65	116.11	11,392.76		161.25	11,554.01
Hilda Lee Endowed Scholarship	18,912.16	(146.12)	18,766.04	193.22	18,959.26		268.35	19,227.61
J. Paul Russell Endowed Scholarship	25,755.45	(199.00)	25,556.45	263.14	25,819.59		365.45	26,185.04
James and June Ellis	515.24	(3.98)	511.26	5.26	516.52		7.31	523.83
James Eugene & Anne Roberts Samsel Endowed Scholarship	26,077.79	(201.49)	25,876.30	266.43	26,142.73		370.02	26,512.75
James L. Dunlap, Sr. Memorial Endowed Scholarship	6,119.93	(47.29)	6,072.64	62.53	6,135.17		86.84	6,222.01
Joan and Frank Kersey Endowed Scholarship	15,202.16	(117.46)	15,084.70	155.32	15,240.02		215.71	15,455.73
John and Goldie Wallace Endowed Scholarship	10,896.54	(84.19)	10,812.35	111.33	10,923.68		154.61	11,078.29
Johnny Russell Endowed Scholarship	17,838.38	(137.83)	17,700.55	182.25	17,882.80		253.11	18,135.91
Jordan Lumber Montgomery Scholars Program Endowed Scholarship	11,525.11	(89.05)	11,436.06	117.75	11,553.81		163.53	11,717.34
Jordan Lumber Endowed Scholarships	32,834.63	(253.70)	32,580.93	335.47	32,916.40		465.90	33,382.30
M.W. "Bill" Mullinix, Sr. and Nancy Hulin Mullinix Endowed Scholarship	13,925.31	(107.59)	13,817.72	142.27	13,959.99		197.59	14,157.58
Madeline and James B. Allen Endowed Scholarship	31,032.69	(239.77)	30,792.92	317.06	31,109.98		440.33	31,550.31
Margaret & Herbert C. Green Forestry Endowment	10,341.19	(79.90)	10,261.29	105.65	10,366.94		146.73	10,513.67
Mary P. and Charles T. Kirk Endowed Scholarship	18,288.44	(141.31)	18,147.13	186.85	18,333.98		259.50	18,593.48
Matt Ellis Endowed Scholarship	23,069.88	(178.25)	22,891.63	235.70	23,127.33		327.34	23,454.67
Matthew and Kim Woodard Endowed Scholarship	16,342.26	(126.27)	16,215.99	166.97	16,382.96		231.88	16,614.84
MidwayUSA Endowed Firearms Fund	103,049.72	8.58	(796.15)	1,052.76	103,297.75		1,462.07	104,759.82
Montgomery Insurance Scholarship Endowment	11,268.87	(87.07)	11,181.80	115.13	11,296.93		159.90	11,456.83
Montgomery Motors Montgomery Scholars Program Endowed Scholarship	14,297.03	(110.47)	14,186.56	146.07	14,332.63		202.86	14,535.49
Montgomery Scholars Program Endowed Scholarship	41,512.94	(320.75)	41,192.19	424.13	41,616.32		589.04	42,205.36

ENDOWED Balance
As of December 31, 2016

Pat and Howard Burkart Endowed Scholarship	27,026.54			(208.82)	26,817.72			276.13	27,093.85	2,000.00	411.79	29,505.64
Progress Energy Endowed Scholarships	39,799.43			(307.51)	39,491.92			406.62	39,898.54		564.72	40,463.26
Progress Energy Montgomery Scholars Program Endowed Scholarship	12,365.91			(95.54)	12,270.37			126.34	12,396.71		175.46	12,572.17
Jesse T. " Jack " Pugh Memorial Endowed Scholarship	11,991.69			(92.65)	11,899.04			122.52	12,021.56		170.15	12,191.71
Quik Chek Montgomery Scholars Program Endowed Scholarship	9,046.92			(69.90)	8,977.02			92.43	9,069.45		128.37	9,197.82
Randolph Electric Membership Corporation Endowed Scholarship	13,561.97			(104.79)	13,457.18			138.56	13,595.74		192.43	13,788.17
Riley and Marilyn Phillips Endowed Scholarship	11,251.98			(86.94)	11,165.04			114.96	11,280.00		159.66	11,439.66
Frank Tedder and Edith Whicker Roberts Endowed Scholarship	51,432.35			(397.39)	51,034.96			525.48	51,560.44		729.78	52,290.22
Samantha B. Hussey Memorial Endowed Scholarship	16,203.53	15.00		(125.31)	16,093.22	303.48		168.83	16,565.53	207.32	237.40	17,010.25
Springs Industries Endowed Scholarship	39,123.20			(302.28)	38,820.92			399.72	39,220.64		555.13	39,775.77
Stanly Regional Medical Center Endowed Scholarship	15,790.54			(122.01)	15,668.53			161.33	15,829.86		224.06	16,053.92
Steve Hamilton Memorial Endowed Scholarship	18,422.03			(142.34)	18,279.69			188.22	18,467.91		261.39	18,729.30
Strong/Thompson Excellence in Forestry Scholarship	5,079.52	130.00		(40.25)	5,169.27	130.00		54.56	5,353.83	130.00	77.62	5,561.45
Harold & Carolyn VanDerveer Nursing Assistant Scholarship Endowment	9,523.75			(73.59)	9,450.16			97.30	9,547.46		135.13	9,682.59
Uwharrie Environmental Montgomery Scholars Program Endowed Scholarship	19,113.78			(147.68)	18,966.10			195.28	19,161.38		271.21	19,432.59
Wanda and Michael Hamilton Memorial Nursing Scholarship Endowment	11,398.62			(88.07)	11,310.55			116.46	11,427.01		161.74	11,588.75
William "Billy" H. Johnson Jr. Endowed Scholarship	2,211.81			(17.09)	2,194.72			22.60	2,217.32		31.38	2,248.70
Willis Endowed Scholarship	15,787.94			(121.99)	15,665.95			161.30	15,827.25		224.02	16,051.27
Win & Elizabeth Dozier Endowed Scholarship	9,392.83			(72.57)	9,320.26			95.97	9,416.23		133.28	9,549.51
Zane Simmons Endowed Scholarship - Pursuit of Excellence	18,606.96	250.00		(141.83)	18,215.13			187.55	18,402.68		260.47	18,663.15
Montgomery Community College Foundation General Endowed Scholarships (Unnamed Funds)	1,126,814.72	35.00	46,907.02	(8,344.10)	1,071,598.60	35.00		11,033.95	1,082,667.55	235.00	15,327.41	1,098,229.96
Total Fund Balance	2,845,274.73	305.00	48,665.60	(21,610.30)	2,775,303.83	593.48	-	28,581.77	2,804,479.08	5,547.32	39,773.03	2,849,799.43

STIF Balance
October - December 2016

STIF Account:	Sep 2016 Balance	Oct 2016 Contributions	Oct 2016 Expenses	Oct 2016 Balance	Nov 2016 Contributions	Nov 2016 Expenses	Nov 2016 Balance	Dec 2016 Contributions	Dec 2016 Expenses	Dec 2016 Balance
Accounting Program	125.00			125.00			125.00			125.00
Alexander Julian Scholarship for Carolina Craft Excellence	180.00			180.00			180.00			180.00
Allied Health Bldg.	12,010.08	25.00		12,035.08	25.00		12,060.08	25.00		12,085.08
American Firearms and Shooting Foundation Scholarship	-			-			-			-
Bear Paw Rifle Merit Scholarship	-			-			-			-
Bell Tower	510.04			510.04			510.04			510.04
Bernice McRae Memorial Scholarship	3,000.00			3,000.00			3,000.00			3,000.00
William "Bill" R. Muse, Jr. Memorial Scholarship	196.40			196.40			196.40			196.40
BLET Program	75.00			75.00			75.00			75.00
Brownells Gunsmithing Scholarships	4,000.00			4,000.00			4,000.00			4,000.00
Bruce Turner Continuing Education Scholarships	711.59	48.00		759.59	48.00		807.59	48.00	306.60	548.99
Business Tech Scholarship	1,255.00			1,255.00			1,255.00			1,255.00
Career and College Promise Program	1,525.00	95.00		1,620.00	95.00	1,525.00	190.00	95.00		285.00
Chi Sigma Club Scholarship	200.00		200.00	-			-			-
Child Study Club Scholarship	100.00			100.00			100.00			100.00
College Transfer AA Program	118.05	10.00		128.05	70.00		198.05	10.00		208.05
Community Involvement	-			-			-			-
Computer Information Technology Program	392.32	12.00		404.32	12.00		416.32	12.00		428.32
Continuing Ed. Art Class Assistance	1,474.00			1,474.00			1,474.00		45.00	1,429.00
Counseling & Career Development Center	671.80	15.00		686.80	15.00		701.80	15.00		716.80
Cross Cut Saw	950.00			950.00			950.00			950.00
Dental Assisting Program	1,940.00			1,940.00			1,940.00			1,940.00
Dianne G. Nelson Scholarship Fund	1,965.00	10.00		1,975.00	10.00		1,985.00	10.00		1,995.00
Donnie Lee Little, Jr. Merit Scholarship								25.00		25.00
Dr. Charles Highsmith Nurses Scholarship-NCCF	840.00		303.60	536.40			536.40			536.40
Early Childhood Program Merit Scholarship	1,480.00	30.00		1,510.00	30.00		1,540.00	30.00		1,570.00
Electrical/Electronics Program	800.00			800.00			800.00			800.00
Emergency Financial Aid	2,525.00			2,525.00			2,525.00			2,525.00
Employee Memorial Garden	43.19			43.19			43.19			43.19
Entrance Landscaping	829.33			829.33			829.33			829.33
FACTS (eCashier)	5,000.00			5,000.00			5,000.00			5,000.00
Food Service Technologies	120.00			120.00			120.00			120.00
Forestry Building	-			-			-			-

Forestry Program	-		-		-		-	
Friend Raising Events	285.00		285.00		285.00		285.00	
Friends of NRA Gunsmithing Scholarship	6,000.00		6,000.00		6,000.00		6,000.00	
Friends of the Library	1,963.06		1,963.06		1,963.06		1,963.06	
High School Equivalency Testing Fees Assistance	250.00		250.00	70.00	180.00		180.00	
Gelynda T. Capel Scholarship Endowment (NCCF)	1,230.00	1,230.00	-		-		-	
General Building Fund	4,307.33		4,307.33		4,307.33		4,307.33	
Glenn & Lynne Hancock Scholarship	-		-		-		-	
Gunsmithing Program	13,823.12	30.00	13,853.12	30.00	13,883.12		13,883.12	
Harold & Carolyn VanDerveer Named Scholarship	1,097.00		1,097.00		1,097.00		1,097.00	
Human Services Program	330.00	10.00	340.00	10.00	350.00	10.00	360.00	
Hunters Helping Kids Merit Scholarship	25.00		25.00		25.00		25.00	
HVAC Program	955.69	5.00	960.69	5.00	965.69	5.00	970.69	
J. & M. Hickman Scholarship	1,000.00	1,000.00	-		-		-	
JF and Jean Allen Family Scholarship-NCCF	-		-		-		-	
Leadership Montgomery	-	1,225.00	128.14	1,096.86	350.00	9.61	1,437.25	175.00
Legacy Gift	-	-	-	-	-	113.61	(113.61)	113.61
Lenue Tyson James Memorial Scholarship	835.00		835.00		835.00		835.00	
Lola Shelton James Memorial Scholarship	-		-		-		-	
Medical Assisting Program	641.50	10.00	651.50	10.00	661.50	10.00	671.50	
Metal Engraving	232.95		232.95		232.95		232.95	
MidwayUSA Firearms Fund	160.29		160.29		160.29		160.29	
Minority Male Mentoring Program	1,000.42	20.00	1,020.42	20.00	1,040.42	20.00	1,060.42	
Minority Male Mentoring Scholarship	910.00		910.00		910.00		910.00	
MLK Day On Challenge	50.00		50.00		50.00		50.00	
Morgan-Hutchinson Scholarship in Arts and Sciences	125.00		125.00		125.00		125.00	
Mr. and Mrs. William B. Landon Scholarship	1,000.00	1,000.00	-		-		-	
Mt. Gilead Civitan Club Scholarship	-		-		-		-	
Mt. Gilead Lions Club Scholarship	-		-		-		-	
Multi-Purpose Room Repairs	493.76		493.76		493.76		493.76	
Nancy Capel - NCCF funds: anonymous	1,660.00		1,660.00		1,660.00		1,660.00	
NRA Foundation Gunsmithing Scholarship	2,980.00		2,980.00		2,980.00		2,980.00	
Nurse Pinning Ceremony	4,674.58	80.00	4,754.58	55.00	4,809.58	35.00	4,844.58	
Nursing Program	30.00		30.00		30.00		30.00	
GENeral Building Fund	-		-		-		-	

STIF Balance
October - December 2016

Appendix E

Open House	14.21		14.21		14.21		14.21		
OST Program	30.66		30.66		30.66		30.66		
PERSIST Program	-		-		-		-		
Pottery Program	2,402.00	200.00	2,202.00		200.00	2,002.00	44.66	1,957.34	
Pottery Scholarship	1,305.86		1,305.86	40.00		1,345.86	60.00	1,405.86	
Problem Gambling Grant	-		-		156.00	(156.00)	464.58	308.58	
Professional Development	22.39		22.39			22.39		22.39	
Quik Chek Named Scholarship NCCF	-		-			-		-	
Relay for Life	-		-			-		-	
Ribbon of Hope Grant	1,966.18		1,966.18		50.55	1,915.63		1,915.63	
Sales Tax Reimbursement	(6,683.48)		(6,683.48)			(6,683.48)		(6,683.48)	
Sandhills Dental Assistant Society Scholarship	1,970.00	10.00	1,980.00	10.00		1,990.00	10.00	2,000.00	
SIM Man-Cannon Foundation	72.60		72.60			72.60		72.60	
Shooting & Hunting Sports Mgmt	70,044.57	134.64	69,909.93		412.32	69,497.61		69,497.61	
Trailblazer Shooting Club	598.24	10.00	608.24	10.00		618.24	10.00	628.24	
Shooting Range	70,030.00		70,030.00			70,030.00		70,030.00	
Student Competition Fund	-		-			-		-	
Student Union/Sports Courts	151.82		151.82			151.82		151.82	
Summer Camp - Forestry	75.00		75.00			75.00		75.00	
Summer Camp - Photography	87.31		87.31			87.31		87.31	
Summer Camp - Clay	49.50		49.50			49.50		49.50	
Taxidermy Program	30.00		30.00			30.00		30.00	
Theodore C. Sanders Gunsmithing Scholarship	3,750.00		3,750.00			3,750.00		3,750.00	
Troy Rotary	-		-			-		-	
Walmart Scholarship	-		-			-		-	
Win & Elizabeth Dozier Named Scholarship	800.00		800.00			800.00		800.00	
Women's Minority Mentoring (Women of Empowerment)	323.13		323.13			323.13		323.13	
Woodrow W. Robinson Scholarship Endowment (NCCF)	370.00		370.00			370.00		370.00	
Accumulated Interest	4,370.26	183.31	4,553.57	178.42		4,731.99		4,731.99	
BB & T Bank ERROR						-		-	
Fund Balance	240,876.75	1,828.31	4,196.38	238,508.68	1,023.42	2,537.09	236,995.01	1183.19	238,178.20

CCP Enrollment Statistics

As of January 31, 2017

Spring 2017

232 students enrolled in 417 classes
East: 147, West: 74, Wescare: 4, Uwharrie
Charter: 1, Home School: 2, South Stanly HS: 2
FTE generated: approximately 47

Fall 2016

213 students enrolled in 363 classes
East: 123, West: 81, Wescare: 3, Home school: 1
FTE generated: approximately 43

Summer 2016

8 students enrolled in 8 classes
East: 6, West: 1, MLA: 1, and Wescare: 1,
FTE generated: approximately .75

Spring 2016

168 students enrolled in 317 classes
88 from East, 69 from West, 4 from home
schools, 6 from Wescare, and 1 from
Montgomery Learning Academy
FTE generated: approximately 34

Fall 2015

207 students enrolled in 369 classes
133 from East, 64 from West, 4 from home
schools, 5 from Wescare, and 1 from Uwharrie
Academy
FTE generated: approximately 41

Spring 2015

195 students enrolled in 397 classes as of 2/5/15
100 from East, 87 from West, 3 from home
schools, and 5 from Wescare
FTE generated: approximately 43

Fall 2014

225 students enrolled in 432 classes
134 from Est, 82 from West, 1 from Richmond Sr.
High, 3 from home schools, and 5 from Wescare
FTE generated: approximately 51

Spring 2014

216 students enrolled in 366 classes
112 from East, 95 from West, 4 from Montgomery
Learning Academy, 1 from North Moore, 2 from
home schools, and 2 from Wescare
FTE generated: approximately 36

Fall 2013

186 students enrolled in 255 classes
110 from East, 66 from West, 1 from Southwest
Randolph, 3 from home schools, and 6 from Wescare
FTE generated: approximately 25

Spring 2013

147 students enrolled in 182 classes
68 from East, 74 from West, 1 from North
Moore, 3 from Wescare, 1 from a home school
FTE generated: approximately 28

Fall 2012

155 students enrolled in 237 classes
90 from East, 57 from West, 1 from North
Moore, and 7 from Wescare
FTE generated: approximately 21

Spring 2012

67 students enrolled in 100 classes
38 from East and 29 from West
FTE generated: approximately 10

Contributions from Other Agencies/Schools	2012SP	2012FA	2013SP	2013FA	2014SP	2014FA	2015SP	2015FA	2016SP	2016FA	2017SP	TOTALS
Book Buy Backs	-	-	85.00	764.00	-	-	-	-	-	-	-	849.00
E-Campus Book Scholarships	-	-	-	-	-	-	-	-	-	1,000.00	-	1,000.00
Independent Home Schoolers/Self-Pay	-	25.00	25.00	100.00	-	125.00	526.67	425.00	100.00	25.00	50.00	1,401.67
Montgomery County Schools	2,700.00	6,050.00	4,850.00	11,500.00	12,900.00	12,975.00	17,975.00	7,875.00	7,357.00	6,600.00	-	90,782.00
Montgomery Community College Bookstore	130.00	-	-	-	-	-	-	-	-	-	-	130.00
Montgomery Community College General Store	-	-	-	-	-	-	-	-	-	89.00	-	89.00
Montgomery Community College Foundation	10,000.00	-	-	5,000.00	-	16,257.00	1,342.00	6,300.00	-	6,525.00	-	45,424.00
Reimbursements for Lost Books	-	-	235.15	-	282.79	197.50	-	-	-	-	-	715.44
Wescare Christian Academy	-	-	375.00	400.00	-	-	375.00	175.00	538.95	125.00	-	1,988.95
Total Contributions per Semester:	12,830.00	6,075.00	5,570.15	17,764.00	13,182.79	29,554.50	20,218.67	14,775.00	7,995.95	14,364.00	50.00	142,380.06

Expense for Career and College Promise Books	2012SP	2012FA	2013SP	2013FA	2014SP	2014FA	2015SP	2015FA	2016SP	2016FA	2017SP	TOTALS
A Book Company, LLC (E-Campus)	-	-	-	25,950.31	15,156.50	884.56	3,779.53	5,360.59	575.65	949.57	852.59	53,509.30
Amazon/ Book Publishers	-	-	151.19	-	-	22,740.45	17,488.52	2,676.15	3,035.62	20,834.12	-	66,926.05
College Bookstore of America (NEEBO)	12,700.00	4,984.17	-	-	-	-	-	-	-	-	-	17,684.17
Montgomery Community College General Store	-	-	-	-	-	-	-	-	-	319.29	-	319.29
MCC Refunded State for Binders for CCP	-	89.12	-	-	-	-	-	-	-	-	-	89.12
Taxes Due to NCDOR from Online Purchases	-	-	10.58	-	-	-	-	-	-	-	-	10.58
Total Expenses per Semester:	12,700.00	5,073.29	161.77	25,950.31	15,156.50	23,625.01	21,268.05	8,036.74	3,611.27	22,102.98	852.59	138,538.51

Amount Billed, but payment not received.

MCC Foundation Budget FY 2016-17

1st Quarter = July-Sept
 2nd Quarter = Oct.-Dec.
 3rd Quarter = Jan.-March
 4th Quarter = April-June

Quarter Ended: 12/31/2016

Account Description	Budget	1st Quarter Expenses	2nd Quarter Expenses	3rd Quarter Expenses	4th Quarter Expenses	Y-T-D Expenses	Unexpended Balance	Percent Expended
Ambassadors Scholarships	\$ 6,000		\$ 3,000			\$ 3,000	\$ 3,000	50%
Mini-Grants	\$ 2,500					\$ -	\$ 2,500	0%
Professional Development	\$ 1,500					\$ -	\$ 1,500	0%
Annual Audit	\$ 4,000					\$ -	\$ 4,000	0%
Friend Raisers	\$ 1,000		\$ 393			\$ 393	\$ 607	39%
Diversity Days	\$ 700					\$ -	\$ 700	0%
Awards Ceremony	\$ 1,000	\$ 631				\$ 631	\$ 369	63%
Donor Appreciation	\$ 1,000					\$ -	\$ 1,000	0%
Donor/Endowment Maintenance	\$ 425					\$ -	\$ 425	0%
Annual Fund Drive	\$ 750					\$ -	\$ 750	0%
Miscellaneous/contingency	\$ 2,000	\$ 214	\$ 420			\$ 634	\$ 1,366	32%
Insurance	\$ 1,500	\$ 1,343				\$ 1,343	\$ 157	90%
MLK Day on Challenge	\$ 1,000		\$ 1,000			\$ 1,000	\$ -	100%
Alumni Program	\$ 2,500					\$ -	\$ 2,500	0%
Occupational Scholarships	\$ 10,000	\$ 4,500	\$ 500			\$ 5,000	\$ 5,000	50%
College and Career Promise Books	\$ 5,000		\$ 5,000			\$ 5,000	\$ -	100%
Raffle/Dinner budget	\$ 7,500					\$ -	\$ 7,500	0%
Golf Torunament	\$ 5,500					\$ -	\$ 5,500	0%
Totals	\$ 53,875	\$ 6,688	\$ 10,313	\$ -	\$ -	\$ 17,001	\$ 36,874	32%

Misc Items:

First Quarter

Sept Board meeting-\$214

Second Quarter

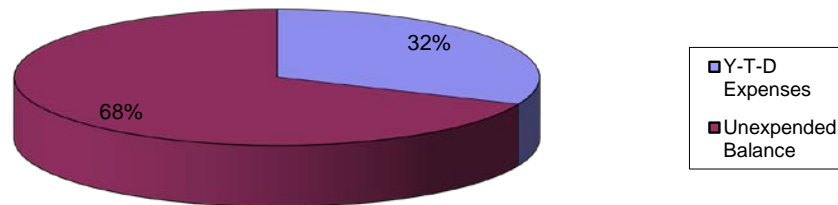
Troy Rotary Golf -\$260

Nov Board Meeting -\$160

Third Quarter

Fourth Quarter

Foundation Budget Chart



8th Annual MLK Challenge



Approximately 65 people at Montgomery Community College (MCC) made 10,368 meals in about 40 minutes in a half-day of service on January 16, 2017. Volunteers from MCC, Communities in Schools, 4-H, Youth Leadership Montgomery, Eckerd Youth Alternatives, MCC Foundation Board and Troy Rotary, participated in the 8th annual Martin Luther King, Jr. Day On Challenge at MCC.

The MLK Day On Challenge is a partnership between MCC, Communities in Schools, and Montgomery County Cooperative Extension. It began in 2010 as a day to honor the legacy of Dr. King through service to others in the community. Each year, the Day On committee meets to select service projects and solicit donations for carrying out project goals.

This year, the committee selected the Feeding Children Everywhere service project to create 10,000 meals to feed those in need in Montgomery County. Feeding Children Everywhere is a non-profit organization based in Florida that provides the supplies and the recipe for creating and packaging these meals.

The meal is a lentil casserole, and each bagged meal feeds a family of six. Each bag consists of 50% lentils - a source of protein and fiber, 30% white rice - a global staple food for carbohydrates, 15% dehydrated vegetables to provide vitamins, and 5% pink Himalayan salt which has 84 different trace minerals. The meal is all natural, extremely healthy, and tastes pretty good according.

Volunteers put together 35 boxes of meals. Each box contains 288 meals which totals 10,080 meals, this year we made a few extras and created 10,368 meals. The boxes were distributed among the county's food pantries, Council on Aging and the Backpack Pals program to provide non-perishable, nutritious meals to Montgomery County families in need.

Prior to staging, assembling and delivering the meals, volunteers met in MCC's Blair Auditorium to view the clips from the Birmingham Children's March. Afterwards, they discussed Dr. King's legacy and how each person can make a difference through service to others. Jesse Tall from Eckerd Youth Alternatives was the motivational speaker. His words of wisdom helped to hopefully inspire the youth to do more in their community to serve others. Funding to make the event possible was provided by the Montgomery Community College Foundation, Troy Rotary Club, Biscoe Food Pantry, New South Realty, Bowers Family, Kat McRae and Partnership for Children.



MLK Challenge Cost	
MCC Foundation	\$ 1,000
Donations	
Gary & Kat McRae	\$ 200
Troy Rotary	\$ 800
John & Gloria Bowers	\$ 100
New South Reality	\$ 300
McRae Industries	\$ 1,000
Biscoe Food Pantry	\$ 600
	<u>\$ 4,000</u>
Plus: In Kind Donations from Bojangles	

Order Information

Purchaser's Name _____

Address _____

City/State/Zip _____

Phone _____

E-mail _____

Please send a gift notification (if applicable) to:

Name _____

Address _____

City/State/Zip _____

Optional

Alumni _____ Yes _____ No

Major _____

Graduating class or last year attended _____

Your Tribute - Your Choice

Legacy Bricks cost \$100. Each 4" x 8" brick can accommodate your choice of the following:

1. Three lines of text with 20 characters each, including spaces and punctuation.
2. Two lines of text with 20 characters each, including spaces and punctuation, separated by your choice of 1.5" emblem. Emblem choices are provided inside this brochure.
3. Three lines of text with 12 characters each, including spaces and punctuation, with your choice of 2" emblem. Emblem choices are provided inside this brochure.
4. If your Legacy Brick is a gift, you may choose for the Montgomery Community College Foundation to notify the recipient with an attractive gift announcement at no additional charge.

Please refer to the inside of this brochure to order your brick(s). Additional order forms are available upon request. Payment should be made to:

Montgomery Community College Foundation
1011 Page Street
Troy, NC 27371

Bricks may also be ordered online at:
www.montgomery.edu/bricks

Deadline for brick orders is April 24, 2017.

Montgomery Community College Foundation



Legacy Bricks

**Purchase a brick.
Leave a legacy.**

Montgomery Community College Foundation
(910) 576-6222, extension 209
eppsl@montgomery.edu



2nd Annual



**Benefit for
MCC Foundation
Scholarships**

TUESDAY, FEBRUARY 14

Taste & Vote

11am-12pm

\$5

**Come back at 12 and get a
bowl of your choice
with fixins!**

Drink included.

**Taste each competitor's fare, then
vote for your favorite!**

Drink included.

Chili Bowl Lunch

12pm-1pm

\$5

Bake Sale, Too!

11am – 1pm

All Happening in the Canteen!

Next to Blair Auditorium

Hosted by MCC Staff Senate



MCC Foundation Important Dates

February 8, 2017	5:30 p.m.	BOT Board Meeting
February 25, 2017	8:30 a.m.	BOT Board Retreat
March 8, 2017	5:30 p.m.	BOT Board Meeting
April 3, 2017	10 a.m.	Legislative Brunch
April 12, 2017	5:30 p.m.	BOT Board Meeting
April 21, 2017		MCC Foundation Golf Tournament
May 10, 2017	11:30 a.m.	Foundation Board Meeting
May 10, 2017	5:00 p.m.	BOT Board Meeting
May 10, 2017	7:00 p.m.	MCC Graduation
June 14, 2017	5:30 p.m.	BOT Board Meeting
August 9, 2017	11:30 a.m.	Foundation Board Meeting
August 9, 2017	5:30 p.m.	BOT Board Meeting
August 10, 2017	5:30 p.m.	MCC 50th Anniversary Open House
September 7, 2017		MCC 50th Anniversary & Bell Dedication
September 13, 2017	5:30 p.m.	BOT Board Meeting
September 22, 2017		MCC 50th Anniversary Gala
October 11, 2017	5:30 p.m.	BOT Board Meeting
November 8, 2017	11:30 a.m.	Foundation Board Meeting
December 8, 2017	7:00 p.m.	MCC Foundation Presents: A Christmas Carol*

*Pending Board Approval

**MCC Foundation
Lynn Epps-Director of Resource Development
Calendar Updates**

Activities since the November Board Meeting

12/5/16	RFP was issued for Investment Management Services
12/7/16-12/9/16	Golden Leaf Scholars Leadership Program Coaches Training
12/12/16	Met with John Slayton with Trust Company NC
1/4/17	Quality Trails –Lunch provided by Foundation as AFD Kickoff
1/5/17	Leadership Montgomery-Government Day
1/13/17-1/15/17	Golden Leaf Scholars Leadership Program Conference
1/17/17	RFP Deadline
1/26/17	HR Meeting
2/2/17	Leadership Montgomery – Education Day
2/4/17	Senior Breakfast @West Montgomery High School

Upcoming Activities

2/9/17	Employee AFD Drawing
2/15/17	Summer Camp meeting w/ County Manager
2/16/17	Early College Open House
2/25/17	BOT Retreat
3/2/17	Leadership Montgomery – Agricultural Day

Annual Fund Drive
Comparison of Contributions by Quarter
As of December 31, 2016

AFD Goal for 2016: \$125,000 in money received and \$30,000 in pledged or new endowments

	2016	2015	2014	2013	2012	2011
January - March	\$15,609.24	\$26,679.16	\$26,857.81	\$215,623.37	\$104,689.73	\$36,508.72
April - June	\$154,075.44	\$24,589.48	\$45,296.60	\$21,545.02	\$65,114.77	\$32,377.99
July - September	\$23,433.28	\$60,584.47	\$14,692.98	\$27,360.34	\$20,367.30	\$70,434.47
October - December	\$17,021.31	\$17,581.42	\$19,385.00	\$50,780.00	\$17,022.46	\$30,992.11
TOTAL	\$210,139.27	\$129,434.53	\$106,232.39	\$315,308.73	\$207,194.26	\$170,313.29

Pledges Made in 2016 for New Scholarships and New Endowments

\$25,000 James Eugene and Anne Roberts Samsel Endowed Scholarship

\$3,000 Bernice McRae Memorial Scholarship

\$250 - Donnie Lee Little Memorial Merit Scholarship

Internal Annual Fund Drive: 95% employees contributing