



MONTGOMERY COMMUNITY COLLEGE FOUNDATION

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

TO: MCC Foundation Board of Directors
FROM: Sherrill L. Bumgarner, President
DATE: April 1, 2015
SUBJ: Foundation Board Agenda

>> The Finance Committee will meet Wednesday, April 8th at 10:30 a.m. in the Boardroom <<

The regular meeting of the Foundation Board of Directors of Montgomery Community College will be held on Wednesday, April 8, 2015 at 11:30 a.m. in the College boardroom in Building 200. Lunch will be provided.

Call to Order – Sherrill L. Bumgarner, Foundation President

Approval of the Agenda – Action – Sherrill L. Bumgarner, Foundation President

Welcome – Sherrill L. Bumgarner

Minutes – Sherrill L. Bumgarner

* January 14, 2015 Foundation Board and Finance Committee Minutes – **Appendix A – Action**

Treasurer Report – Jeanette McBride, Foundation Treasurer

- * Fund Statements – **Appendix B– Action**
- * Donation Reports – **Appendix C – Action**
- * CCP Books Update – **Appendix D**

Finance Committee Report – D. Gary McRae, Committee Chair

- * 2015-16 Scholarship Liability – **Appendix E – Action**

Foundation Reports – Gay Roatch, Foundation Director

- * 2014-2015 Budget Review – **Appendix F**
- * 2015-2016 Proposed Budget – **Appendix G – Action**
- * Mini Grant Request for MCC Open House – **Appendix H – Action**
- * Alumni Program Update – **Appendix I – Action**
- * Lapel Pins – **Appendix J – Action**
- * Occupational Scholarships – **Appendix K**
- * MLK Day On Challenge – **Appendix L**
- * 17th Annual Golf Tournament – Densons Creek – Friday, April 17, 2015 – **Appendix M**
- * Calendar Review – **Appendix N**
- * MCC Grants Update – **Appendix O**



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2014 Annual Fund Drive – Jean Abbott, Committee Chair & Gay Roatch, Foundation Director

* 2015 Annual Fund Drive Cumulative Donations – Appendix P

President's Report

New Business

Adjourn

Next Meeting August 12, 2015

Montgomery Community College
Foundation Board of Directors
1-14-15
Meeting

Members of the MCC Foundation Board of Directors met on January 14, 2015 at 11:30 a.m. in the Board room. Present were Jean Abbott, Claudia Bulthuis, Mary Chesson, Katie Dunlap, Lynne Hancock, Anna Hollers, Jeanette McBride, Sandra Miller, Brenda Ritter, Gay Roatch, John Slaton, Kevin Smith, Jada Greene, and Korrie Ervin.

Mr. Smith, Vice President, called the meeting to order.

Mrs. Bulthuis made a motion, seconded by Mrs. Miller to approve the agenda. The motion carried.

Mr. Smith welcomed Mr. John Slaton from the Trust Company of North Carolina.

Mr. Smith presented Appendix A, the minutes from the previous meetings. Mrs. Ritter made a motion, seconded by Mrs. Miller, to approve the minutes from the previous meetings.

Mrs. McBride presented Appendix B and Appendix C, the fund statements and donation reports. Mrs. Ritter made a motion, seconded by Mrs. Bulthuis, to approve the fund statements and donation reports. The motion carried.

Mr. Slaton presented Appendix D, an update on the investment funds. Mrs. Chesson brought forth a motion from the Finance Committee meeting to recommend changes to the asset allocations as proposed by Mr. Slaton and the Trust Company of North Carolina. Coming from Committee, this required no second. The motion carried.

Mr. Slaton reported that the Foundation assets are managed prudently and conservatively.

Ms. Roatch presented Appendix E, the 2014-2015 Budget Review. She noted that the funds allocated for the Donor Appreciation can be repurposed.

Mrs. Bulthuis expressed concern that the Foundation no longer has any reserve for the CCP books. She asked for a status of the CCP books.

Ms. Roatch presented Appendix F, an idea to repurpose the Donor Appreciation funds. She presented the quote to purchase Montgomery Community College pins with the College logo.

Mrs. Dunlap made a motion, seconded by Mrs. Bulthuis, to approve repurposing the Donor Appreciation funds to purchase MCC pins to give to graduates. During discussion, the Board discussed who will be receiving these pins. Mr. Smith noted that this is a great way to brand the college in the community. The motion carried.

Ms. Roatch presented Appendix G, the list of occupational scholarships. She noted that these funds have become more important to Continuing Education, as they are no longer receiving funding for Project Skill Up.

Ms. Roatch presented Appendix H, an update on the Friendraising and Diversity Team events. She noted that the Veterans Day and A Christmas Memory events are the only events the Foundation has sponsored so far this year. Funds for the Diversity Team were used at a Diversity Day event. The event was well attended.

Ms. Roatch presented Appendix I, the Montgomery Bandstand review.

Ms. Roatch presented Appendix J, an overview of what is planned for the MLK Day On Challenge.

Ms. Roatch presented Appendix K, the announcement for the upcoming Golf Tournament. The tournament is planned for April 17. Ms. Roatch will be looking at different methods of advertising the event.

Ms. Roatch presented Appendix L, the calendar of events. There was one correction to the calendar. The next Board meeting will be April 8, 2015.

Ms. Roatch presented Appendix M, a grants update. She reported that the Palmer Foundation grant that was awarded is not able to be implemented at the college. We are waiting to hear if this grant can be implemented in the high schools.

Ms. Roatch presented the results of the 2014 Annual Fund Drive. It was recommended not to do a big kick-off for the 2015 Annual Fund Drive. They plan to have a letter writing campaign.

Mrs. Hollers suggested a letter writing campaign to alumni, especially those that have received scholarships.

Mrs. Chesson reported that each program has an advisory committee and almost all of them have alumni on that committee.

Goals for the 2015 Annual Fund Drive were proposed at \$125,000 and \$30,000 for pledges. Mrs. Bulthuis made a motion, seconded by Mrs. Miller, to approve the 2015 Annual Fund Drive goals at \$125,000 and three new endowments.

Mrs. Chesson gave an update on the Presidential search. She noted lessons she has learned while serving as Interim President.

Ms. Roatch reported that she will be taking pictures of scholarship recipients with a “Thank You” message.

There being no further business, Mrs. Ritter made a motion, seconded by Mrs. Miller, to adjourn. The motion carried.

Sherrill Bumgarner, President

**Finance Committee Meeting
January 14, 2015**

The Finance Committee met Wednesday, January 14, 2015, at 10:30 a.m. in the Boardroom. Present were Mary Chesson, Anna Hollers, Jeanette McBride, Gay Roatch, John Slaton, Kevin Smith and Korrie Ervin.

Ms. Roatch presented the Investment Policy. This policy needs to be updated to fit the needs of the Foundation.

Mrs. Hollers and Mr. Slaton discussed the Investment Policy.

Ms. Roatch reported that the bylaws are very general regarding investments. She noted that the Finance Committee also serves as the Investment Committee. Following discussion, it was recommended to include a paragraph regarding the investment authority being with the Finance Committee. Mrs. Hollers recommended the Board look into creating a charter for the committee to note their responsibilities.

Mr. Slaton will be presenting a five-year progress report after April.

Mr. Slaton will be presenting the asset allocation to the full Board for approval at today's meeting.

Ms. Roatch will be contacting peers at other colleges regarding the minimum years of comparison.

The Investment Policy will be brought before the Board for approval at the April meeting.

Mr. Slaton will be providing Ms. Roatch with a comparable charter for the Finance/Investment Committee.

Mr. Slaton presented the proposed changes to the asset allocation. He reported that it will continue with a 50/50 spread. He reported that there are no major changes being made to the allocations

The committee discussed changes to the investment policy. The committee agreed to include the investment horizon.

Mr. Slaton presented the proposed allocation fund changes.

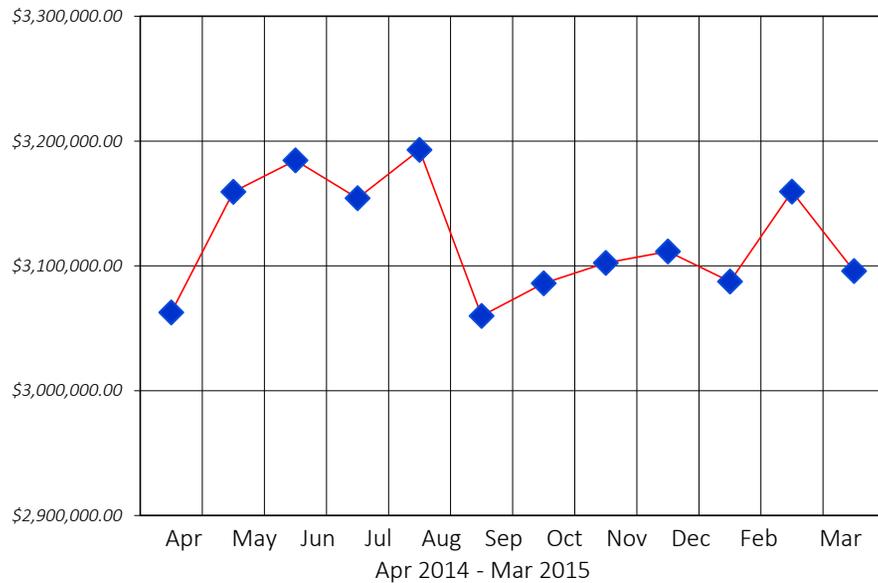
Mrs. Chesson made a motion, seconded by Mr. Smith, to approve the proposed allocation fund changes recommended by Mr. Slaton. The motion carried.

There being no further business, the meeting adjourned.

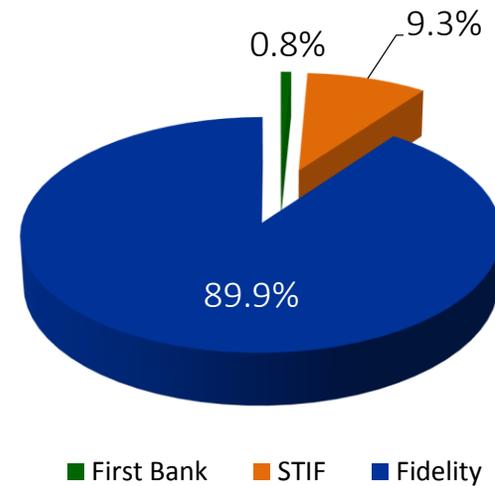
Montgomery Community College Foundation Funds Statement FY 2014-2015

	Fiscal Year To Date 07/01/2014 thru 03/31/2015				Month of 2/1/2015 thru 03/31/2015			
	Fidelity Bank	STIF	First Bank	Total	Fidelity Bank	STIF	First Bank	Total
Beginning Value	\$2,836,379.29	\$324,349.17	\$23,801.87	\$3,184,530.33	\$2,839,470.41	\$301,488.12	\$18,455.17	\$3,159,413.70
Receipts								
Interest/Gains	\$37,182.49	\$1,063.74	\$3.56	\$38,249.79	\$5,321.66	\$127.56	\$0.37	\$5,449.59
Deposits	\$36,001.16	\$29,908.00	\$90,125.80	\$156,034.96	\$4,476.16	\$3,533.00	\$17,690.30	\$25,699.46
Total Receipts	\$73,183.65	\$30,971.74	\$90,129.36	\$194,284.75	\$9,797.82	\$3,660.56	\$17,690.67	\$31,149.05
Disbursements								
Withdrawals/Fees	\$126,850.80	\$67,945.75	\$89,522.63	\$284,319.18	\$48,573.93	\$17,773.52	\$11,737.24	\$78,084.69
Total Disbursements	\$126,850.80	\$67,945.75	\$89,522.63	\$284,319.18	\$48,573.93	\$17,773.52	\$11,737.24	\$78,084.69
Market Value Net Change	\$1,247.97	\$0.00	\$0.00	\$1,247.97	(\$16,734.19)	\$0.00	\$0.00	(\$16,734.19)
Ending Value	\$2,783,960.11	\$287,375.16	\$24,408.60	\$3,095,743.87	\$2,783,960.11	\$287,375.16	\$24,408.60	\$3,095,743.87
Net Change	(\$52,419.18)	(\$36,974.01)	\$606.73	(\$88,786.46)	(\$55,510.30)	(\$14,112.96)	\$5,953.43	(\$63,669.83)

Foundation Funds Value



Foundation Funds Distribution



STIF Balances
As of March 31, 2015

STIF Account:	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 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.	11,700.08			11,700.08			11,700.08			\$ 11,700.08
American firearms and shooting scholarship	2,500.00			2,500.00			2,500.00			\$ 2,500.00
Bear Paw Rifle Merit Scholarship								500.00		\$ 500.00
Bell Tower	510.04			510.04			510.04			\$ 510.04
Bill Muse Scholarship	-			-	50.00		50.00			\$ 50.00
BLET Program								25.00		\$ 25.00
Brownells Inc. Gunsmithing Scholarship	4,500.00			4,500.00			4,500.00	2,000.00	2,200.00	\$ 4,300.00
Bruce Turner Con Ed	737.79			737.79	310.00	100.00	947.79	133.00	200.00	\$ 880.79
Business Tech Scholarship	1,255.00			1,255.00			1,255.00			\$ 1,255.00
Career and College Promise	600.00			600.00	220.00		820.00	250.00		\$ 1,070.00
Chi Sigma Club	-			-			-			\$ -
Child Study Club	-			-			-	10.00		\$ 10.00
College Transfer AA Program	8.05			8.05			8.05	60.00		\$ 68.05
Computer Information Technology Program	88.32			88.32	100.00		188.32	10.00		\$ 198.32
Continuing Ed. Art Class Assistance	1,319.00			1,319.00	110.00	45.00	1,384.00	25.00		\$ 1,409.00
Cooking for Susan	0.00			0.00			0.00			\$ 0.00
Counseling & Career Development Center	375.00			375.00	15.00		390.00	15.00		\$ 405.00
Cross Cut Saw	950.00			950.00			950.00			\$ 950.00
Dental Assisting Program	1,835.00			1,835.00	5.00		1,840.00	5.00		\$ 1,845.00
Diane Nelson Scholarship Fund	1,365.00			1,365.00	10.00		1,375.00	60.00		\$ 1,435.00
Dr. Charles Highsmith Nurses Scholarship-NCCF	-			-			-	810.00		\$ 810.00
Early Childhood Program / Scholarship	1,360.00			1,360.00	20.00		1,380.00	20.00		\$ 1,400.00
Electrical/Electronics Program	680.00			680.00			680.00	10.00		\$ 690.00
Emergency Financial Aid	2,625.00			2,625.00			2,625.00			\$ 2,625.00
Employee Memorial Garden	23.19			23.19			23.19			\$ 23.19

**STIF Balances
As of March 31, 2015**

STIF Account:	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Balance
Entrance Landscaping	849.33			849.33			849.33			\$ 849.33
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	340.73			340.73	10.00		350.73			\$ 350.73
Forestry Program	1,374.38			1,374.38	10.00		1,384.38			\$ 1,384.38
Frederick & Myra Taylor Scholarship	-			-			-			\$ -
Friend Raising Events	285.00			285.00			285.00			\$ 285.00
Friends of NRA Gunsmithing Scholarship	4,000.00			4,000.00			4,000.00			\$ 4,000.00
Friends of the Library	1,793.06			1,793.06			1,793.06	75.00		\$ 1,868.06
GED Fees Assistance	170.00			170.00			170.00	20.00		\$ 190.00
Gelynda T. Capel NCCF funds	200.00			200.00			200.00	1,240.00	200.00	\$ 1,240.00
General Building Fund	4,172.33			4,172.33	15.00		4,187.33	10.00		\$ 4,197.33
Glenn & Lynne Hancock Scholarship	3,710.04			3,710.04	50.00		3,760.04			\$ 3,760.04
Gunsmithing Program	12,061.39			12,061.39	30.00	386.29	11,705.10	1,020.00	15.89	\$ 12,709.21
Harold & Carolyn VanDerveer Named Scholarship	1,609.00		606.00	1,003.00			1,003.00			\$ 1,003.00
Human Services Program	160.00			160.00			160.00	10.00		\$ 170.00
Hunters Helping Kids Named Scholarship	275.00			275.00			275.00		250.00	\$ 25.00
HVAC Program	545.69			545.69	25.00		570.69	70.00		\$ 640.69
J. & M. Hickman Scholarship	42.40			42.40			42.40		30.80	\$ 11.60
JF and Jean Allen Family Scholarship-NCCF	-			-			-			\$ -
Lola S. James Memorial Scholarship	130.82			130.82			130.82		130.82	\$ -
Medical Assisting Program	411.50			411.50	10.00		421.50	10.00		\$ 431.50
Metal Engraving	232.95			232.95			232.95			\$ 232.95
MidwayUSA Firearms Fund	8,000.00		2,988.40	5,011.60			5,011.60			\$ 5,011.60
Minority Male Mentoring Program	520.42			520.42	20.00		540.42	70.00		\$ 610.42
Minority Male Mentoring Scholarship	1,410.00			1,410.00			1,410.00		250.00	\$ 1,160.00
MLK Day On Challenge	600.00			600.00		600.00	-			\$ -

STIF Balances
As of March 31, 2015

STIF Account:	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Balance
Morgan Hutchison Scholarship	-			-			-	50.00		\$ 50.00
MPK Retirement	8.47			8.47			8.47			\$ 8.47
Mr. and Mrs. William B. Landon Scholarship	-			-			-			\$ -
Mt. Gilead Civitan Club	-			-			-			\$ -
Mt. Gilead Lions Club	100.00			100.00			100.00	50.00		\$ 50.00
Multi-Purpose Room Repairs	12,500.00			12,500.00			12,500.00			\$ 12,500.00
Anonymous	1,510.00			1,510.00			1,510.00	1,494.60		\$ 15.40
NRA Foundation Gunsmithing Scholarship	6,800.00			6,800.00			6,800.00	6,800.00		\$ -
Nurse Pinning Ceremony	307.21			307.21			307.21	225.00		\$ 532.21
Nursing Program	30.00			30.00			30.00			\$ 30.00
Office Admini. - Marketing	9.04			9.04			9.04			\$ 9.04
OST Program	21.62			21.62			21.62			\$ 21.62
Palmer Foundation-Project Lead The Way	36,088.22			36,088.22		275.28	35,812.94	296.14		\$ 36,109.08
PERSIST Program	117.59			117.59			117.59			\$ 117.59
Pottery Program	2,455.00			2,455.00			2,455.00			\$ 2,455.00
Professional Development	622.39		600.00	22.39			22.39			\$ 22.39
Quik Chek Named Scholarship NCCF	-			-			-			\$ -
Ribbon of Hope Grant	5,173.76			5,173.76			5,173.76			\$ 5,173.76
Sandhills Dental Asst. Scholars	1,670.00			1,670.00	10.00		1,680.00	10.00		\$ 1,690.00
Shooting & Hunting Sports Mgmt	80,981.84		668.69	80,313.15		926.13	79,387.02			\$ 79,387.02
Shooting Club	313.24			313.24	35.00		348.24	15.00		\$ 363.24
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
Student Competition Fund	50.00			50.00	20.00		70.00			\$ 70.00
Student Union/Sports Courts	146.82			146.82			146.82	5.00		\$ 151.82
Summer Camp - Forestry	75.00			75.00			75.00			\$ 75.00
Summer Camp 2013 - Photography	87.31			87.31			87.31			\$ 87.31

STIF Balances
As of March 31, 2015

STIF Account:	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Balance
Summer Clay Camp	11.03			11.03			11.03			\$ 11.03
Taxidermy Program	20.00			20.00			20.00			\$ 20.00
Theodore C. Sanders Gunsmithing Scholarship	4,000.00			4,000.00			4,000.00	4,000.00	4,000.00	\$ 4,000.00
Walmart Scholarship	-			-			-			\$ -
Win & Elizabeth Dozier Named Scholarship	-			-			-			\$ -
Women's Minority Mentoring (Women of Empowerment)	313.13			313.13			313.13	10.00		\$ 323.13
Woodrow Robinson Scholarship-NCCF	350.00			350.00			350.00		350.00	\$ -
Accumulated Interest	1,171.44	131.81		1,303.25	105.60		1,408.85	127.56		\$ 1,536.41
BB & T Bank ERROR	4.00			4.00			4.00			\$ 4.00
Fund Balance	\$ 305,970.09	\$ 131.81	\$ 4,863.09	\$ 301,238.81	\$ 1,180.60	\$ 2,332.70	\$ 300,086.71	\$ 11,196.70	\$ 15,972.11	\$ 295,311.30

**ENDOWED Balances
As of March 31, 2015**

Fund Name	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Inv. Gains/Losses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Inv. Gains/Losses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Inv. Gains/Losses	Mar 2015 Balance
Alan Gutschmit Early Childhood Endowed Scholarship	\$ 13,722.68			\$ (101.59)	\$ 13,621.08			\$ 321.57	\$ 13,942.66		\$ 175.32	\$ (66.56)	\$ 13,700.77
Andy Speer Taxidermy Endowed Scholarship	2,595.82			(19.22)	2,576.60			60.83	2,637.43	25.00		(12.87)	\$ 2,649.56
Anna Hollers Montgomery Scholars Endowed Scholarship	15,974.75			(118.26)	15,856.48			374.35	16,230.83			(78.47)	\$ 16,152.36
Becky and Eben Wallace CJ Endowed Scholarship	15,789.42			(116.89)	15,672.53			370.00	16,042.53		253.68	(76.34)	\$ 15,712.51
Better Burger Endowed Scholarship	13,321.55			(98.62)	13,222.92			312.17	13,535.10			(65.44)	\$ 13,469.66
Betty M. Reynolds Endowed Scholarship	4,534.51			(33.57)	4,500.94			106.26	4,607.20			(22.27)	\$ 4,584.92
Bill Maness Family Endowed Scholarships (2)	23,379.71			(173.09)	23,206.63			547.87	23,754.50		500.00	(112.43)	\$ 23,142.07
Blanche Bray Farlowe Endowed Scholarship	12,707.17			(94.07)	12,613.10			297.77	12,910.87			(62.42)	\$ 12,848.45
Brady and Joan Dickson Endowed Scholarship	20,247.83			(149.90)	20,097.93			474.48	20,572.41		1,194.87	(93.69)	\$ 19,283.85
Branson and Lorraine McRae Montgomery Scholars Endowed Scholarship	32,667.38			(241.84)	32,425.54			765.51	33,191.05	2,300.00		(171.59)	\$ 35,319.46
Brenda Chriscoe Ritter Endowed Scholarship	12,032.67			(89.08)	11,943.59			281.97	12,225.56		878.60	(54.86)	\$ 11,292.10
Brittany C. Maness Honorary Endowed Scholarship	12,375.98			(91.62)	12,284.36			290.01	12,574.37			(60.79)	\$ 12,513.58
Bulthuis Endowed Scholarship	15,284.34			(113.15)	15,171.19			358.17	15,529.36		625.60	(72.06)	\$ 14,831.70
Capel Incorporated Endowed Scholarship	56,466.36			(418.03)	56,048.32			1,323.21	57,371.53	100.00	878.60	(273.62)	\$ 56,319.31
Capel, Capel, and Hric Montgomery Scholars Endowed Scholarship	19,808.19			(146.64)	19,661.54			464.18	20,125.72			(97.30)	\$ 20,028.41
Chris Deaton, Jodie Noah, Brandon Simmons and Austin Williams Memorial Endowed Scholarship	18,952.45			(140.31)	18,812.14			444.12	19,256.26			(93.10)	\$ 19,163.16
Claire Menard Students Helping Students	12,536.36			(92.81)	12,443.55			293.77	12,737.32			(61.58)	\$ 12,675.74
Clay Vance Richardson Memorial Endowed Scholarship	13,463.36			(99.67)	13,363.69			315.49	13,679.18			(66.14)	\$ 13,613.05
Kelly Stafford, Emily Hamilton, Stacey Stafford and Daniel Hamilton Honorary Endowed Scholarship	11,019.97			(81.58)	10,938.39			258.24	11,196.63			(54.13)	\$ 11,142.49
Drs. Joseph Reese Blair and Claudia B. Blair Endowed Scholarship	56,259.66			(416.50)	55,843.16			1,318.36	57,161.53		729.60	(272.84)	\$ 56,159.09
Earle and Jean Connelly Endowed Scholarship	45,116.64			(334.01)	44,782.64			1,057.24	45,839.88			(221.63)	\$ 45,618.25
Fidelity Bank Biscoe Branch Endowed Scholarship	14,300.43			(105.87)	14,194.57			335.11	14,529.68		250.00	(69.04)	\$ 14,210.64
Fidelity Bank Candor Branch Endowed Scholarship	14,556.60			(107.77)	14,448.84			341.11	14,789.95		250.00	(70.30)	\$ 14,469.65
Fidelity Bank Star Branch Endowed Scholarship	19,326.83			(143.08)	19,183.75			452.90	19,636.65		250.00	(93.73)	\$ 19,292.92
Fidelity Bank Troy Branch Endowed Scholarship	14,300.43			(105.87)	14,194.57			335.11	14,529.68		250.00	(69.04)	\$ 14,210.64
First Bank Endowed Scholarship	49,566.51			(366.95)	49,199.56			1,161.52	50,361.08		1,577.70	(235.86)	\$ 48,547.52
First Bank Montgomery Scholars Endowed Scholarship	18,653.01			(138.09)	18,514.91			437.11	18,952.02			(91.63)	\$ 18,860.39
First Bank Montgomery Scholars Endowed Scholarship 2	17,591.67			(130.24)	17,461.43			412.24	17,873.67			(86.42)	\$ 17,787.25
FirstHealth of the Carolinas Endowed Scholarships	76,600.11			(567.09)	76,033.02			1,795.01	77,828.03		3,341.08	(360.13)	\$ 74,126.82
First National Bank and Trust Endowed Scholarship (CommunityOne)	14,130.47			(104.61)	14,025.86			331.13	14,356.99		598.78	(66.52)	\$ 13,691.69
Fred H. and Louise A. Powell Endowed Scholarship	13,618.71			(100.82)	13,517.89			319.13	13,837.02			(66.90)	\$ 13,770.13
Frederick Leslie Taylor Endowed Scholarship	12,575.47			(93.10)	12,482.37			294.69	12,777.06			(61.77)	\$ 12,715.29
Gelynda T. and Arron W. E. Capel MSP Endowed Scholarship	24,375.57			(180.46)	24,195.12			571.21	24,766.32			(119.74)	\$ 24,646.58
Gilbert A. "Sonny" Holt Memorial Nursing Endowed Scholarship	17,450.69			(129.19)	17,321.50			408.93	17,730.43		500.00	(83.31)	\$ 17,147.13
Gordon & Susan Knowles Endowed Scholarship	5,097.51			(37.74)	5,059.78			119.45	5,179.23	500.00		(27.46)	\$ 5,651.77
Grady & Alvis Goforth Boy Scouts and Venture Crew Endowment	11,393.78			(84.35)	11,309.43			267.00	11,576.43			(55.97)	\$ 11,520.46

**ENDOWED Balances
As of March 31, 2015**

Appendix B.7

Fund Name	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Inv. Gains/Losses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Inv. Gains/Losses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Inv. Gains/Losses	Mar 2015 Balance
Grady G. Thomas Memorial Endowed Scholarship	36,296.00			(268.71)	36,027.29			850.54	36,877.83			(178.30)	\$ 36,699.54
Grede Endowed Scholarship	4,995.45			(36.98)	4,958.46	10,000.00		353.14	15,311.61			(74.03)	\$ 15,237.58
Growler Group Endowed Scholarship	37,186.35			(275.30)	36,911.05			871.41	37,782.46			(182.67)	\$ 37,599.79
Hartley & West Endowment	11,320.09			(83.81)	11,236.28			265.27	11,501.55			(55.61)	\$ 11,445.94
Hilda Lee Endowed Scholarship	19,397.34			(143.60)	19,253.73			454.55	19,708.28		313.98	(93.77)	\$ 19,300.53
J. Paul Russell Endowed Scholarship	25,883.50			(191.62)	25,691.88			606.54	26,298.43			(127.15)	\$ 26,171.28
Joan and Frank Kersey Endowed Scholarship	15,311.88			(113.36)	15,198.52			358.81	15,557.34			(75.22)	\$ 15,482.12
John and Goldie Wallace Endowed Scholarship	11,712.04			(86.71)	11,625.33			274.45	11,899.79		752.99	(53.89)	\$ 11,092.90
Johnny Russell Endowed Scholarship	18,368.25			(135.98)	18,232.26			430.43	18,662.70		368.37	(88.45)	\$ 18,205.88
Jordan Lumber Endowed MSP Scholarship 2	11,631.20			(86.11)	11,545.09			272.56	11,817.65			(57.14)	\$ 11,760.52
Jordan Lumber Endowed Scholarship 1	33,602.73			(248.77)	33,353.96			787.43	34,141.39		473.10	(162.78)	\$ 33,505.51
M.W. "Bill" Mullinix, Sr. and Nancy Hulin Mullinix Endowed Scholarship	14,025.49			(103.83)	13,921.66			328.67	14,250.32			(68.90)	\$ 14,181.43
Madeline and James B. Allen Endowed Scholarship	31,255.52			(231.39)	31,024.13			732.43	31,756.56			(153.54)	\$ 31,603.02
Margaret & Herbert C. Green Forestry Endowment	7,102.99			(52.59)	7,050.41			166.45	7,216.86	1,000.00		(39.73)	\$ 8,177.13
Mary P. and Charles T. Kirk Endowed Scholarship	18,456.55			(136.64)	18,319.91			432.50	18,752.42		509.29	(88.20)	\$ 18,154.92
Matt Ellis Endowed Scholarship	21,656.80			(160.33)	21,496.47			507.50	22,003.97			(106.38)	\$ 21,897.58
Matthew and Kim Woodard Endowed Scholarship	16,445.61			(121.75)	16,323.86			385.38	16,709.24			(80.79)	\$ 16,628.45
MidwayUSA Endowed Firearms Fund	104,521.36			(773.79)	103,747.56			2,449.31	106,196.87			(513.44)	\$ 105,683.43
Montgomery Insurance Scholarship Endowment	9,059.66			(67.07)	8,992.59			212.30	9,204.89			(44.50)	\$ 9,160.38
Montgomery Motors Montgomery Scholars Endowed Scholarship	14,428.87			(106.82)	14,322.05			338.12	14,660.17			(70.88)	\$ 14,589.29
Montgomery Scholars Program Endowed Scholarship	41,858.07			(309.88)	41,548.18			980.88	42,529.07	40.00		(205.81)	\$ 42,363.25
Pat and Howard Burkart Endowed Scholarship	27,768.96			(205.58)	27,563.38			650.73	28,214.10		556.60	(133.72)	\$ 27,523.79
Progress Energy Endowed Scholarship	41,645.56			(308.31)	41,337.25			975.90	42,313.16		1,504.60	(197.30)	\$ 40,611.26
Progress Energy MSP Endowed Scholarship	12,444.12			(92.13)	12,351.99			291.61	12,643.60			(61.13)	\$ 12,582.47
Jesse T. " Jack " Pugh Memorial Scholarship	7,483.59			(55.40)	7,428.19			175.37	7,603.56			(36.76)	\$ 7,566.79
Quik Chek Montgomery Scholars Endowed Scholarship	8,882.13			(65.76)	8,816.37			208.14	9,024.51			(43.63)	\$ 8,980.88
Randolph Electric Membership Corp. Endowed Scholarship	14,359.77			(106.31)	14,253.46			336.50	14,589.96		683.27	(67.24)	\$ 13,839.45
Riley and Marilyn Phillips Endowed Scholarship	11,040.37			(81.73)	10,958.64			258.72	11,217.35	30.00		(54.38)	\$ 11,192.97
Frank Tedder and Edith Whicker Roberts Endowed Scholarship	51,757.58			(383.17)	51,374.41			1,212.86	52,587.27			(254.25)	\$ 52,333.02
Samantha B.Hussey Memorial Endowed Scholarship	13,334.16			(98.72)	13,235.45	35.00		313.29	13,583.74	46.16	664.34	(62.69)	\$ 12,902.88
Springs Industries Endowed Scholarship	38,410.56			(284.36)	38,126.20			900.10	39,026.29			(188.68)	\$ 38,837.61
Stanly Regional Medical Center Endowed Scholarship	16,446.14			(121.75)	16,324.39			385.39	16,709.78		875.14	(76.56)	\$ 15,758.08
Steve Hamilton Memorial Endowed Scholarship	17,986.82			(133.16)	17,853.66	20.00		421.97	18,295.63	75.00		(88.82)	\$ 18,281.81
Strong/Thompson Excellence in Forestry Scholarship										145.00		(0.70)	\$ 144.30
Harold & Carolyn VanDerveer Nursing Assistant Endowed Scholarship	7,532.33			(55.76)	7,476.57			176.51	7,653.08			(37.00)	\$ 7,616.08
Uwharrie Environmental MSP Endowed Scholarship	19,289.50			(142.80)	19,146.70			452.02	19,598.72			(94.76)	\$ 19,503.97

**ENDOWED Balances
As of March 31, 2015**

Fund Name	Dec 2014 Balance	Jan 2015 Contributions	Jan 2015 Expenses	Jan 2015 Inv. Gains/Losses	Jan 2015 Balance	Feb 2015 Contributions	Feb 2015 Expenses	Feb 2015 Inv. Gains/Losses	Feb 2015 Balance	Mar 2015 Contributions	Mar 2015 Expenses	Mar 2015 Inv. Gains/Losses	Mar 2015 Balance
Wanda and Michael Hamilton Memorial Nursing Endowed Scholarship	11,913.80			(88.20)	11,825.60			279.18	12,104.78		418.31	(56.50)	\$ 11,629.97
William "Billy" H. Johnson Jr. Endowed Scholarship	1,580.25			(11.70)	1,568.55	90.00		39.16	1,697.70	45.00		(8.43)	\$ 1,734.28
Willis Endowed Scholarship	15,933.25			(117.96)	15,815.30			373.37	16,188.67			(78.27)	\$ 16,110.40
Win & Elizabeth Dozier Endowed Scholarship	5,715.56			(42.31)	5,673.24			133.94	5,807.18			(28.08)	\$ 5,779.10
Zane Simmons Endowed Scholarship	18,771.29			(138.97)	18,632.32			439.88	19,072.20		250.00	(91.00)	\$ 18,731.20
General Endowed (Unnamed Funds)	1,185,715.30			(8,778.11)	1,176,937.19	250.00		27,791.42	1,204,978.61	240.00	26,836.43	(5,697.23)	\$ 1,172,684.95
Total Fund Balance	\$ 2,784,321.41	\$ -	\$ -	\$ (20,612.95)	\$ 2,763,708.46	\$ 10,395.00	\$ -	\$ 65,491.95	\$ 2,839,595.41	\$ 4,546.16	\$ 46,460.25	\$ (13,526.21)	\$ 2,784,155.11



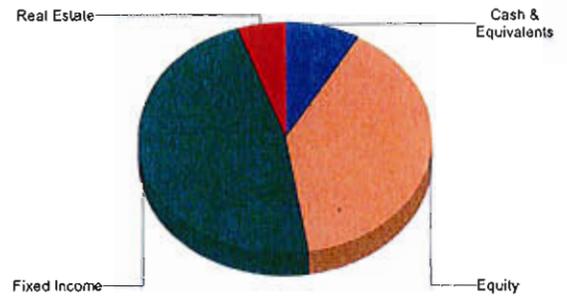
Montgomery Community College Foundation Investment Management Agency

MONTGOMERY COMMUNITY COLLEGE FOUNDATION
Gay Roatch
1011 Page Street
Troy, NC 27371

Report Period: From 3/1/2015 To 3/31/2015
Your Contact:

Administrator: John H. Slayton

	Market Value as of 3/31/15	% of Total	Estimated Income
Cash Equivalents	228,646.65	8.21	22.87
Fixed Income	1,307,429.75	46.96	32,562.81
Equity	1,097,434.92	39.42	21,855.73
Real Estate	150,448.79	5.40	5,074.78
Total Assets	2,783,960.11	100.00	59,516.19
Total Assets	2,783,960.11	100.00	59,516.19



	Current Period	Year To Date
Beginning Market Value	2,839,470.41	2,780,761.41
Investment Activity		
Dividends	5,321.66	5,393.55
Total Investment Activity	5,321.66	5,393.55
Receipts		
Cash Deposits	4,476.16	18,306.16
Total Receipts	4,476.16	18,306.16
Disbursements		
Fees	(2,113.68)	(6,268.79)
Withdrawals & Distributions	(46,460.25)	(46,460.25)
Total Disbursements	(48,573.93)	(52,729.04)
Change in Market Value	(16,734.19)	32,228.03
Ending Market Value	2,783,960.11	2,783,960.11

	Year To Date
Long Term	266,908.18
Short Term	2,198.73
Total Realized Gain/Loss on Cost	269,106.91

Montgomery Community College Foundation Investment Management Agency

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Report Period: From 3/1/2015 To 3/31/2015

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
CASH & EQUIVALENTS								
Money Markets								
228,646.65	FEDERATED US GOVERNMENT OBLIGATIONS FUND FUND NUMBER 5 - PRINCIPAL	228,646.65	1.00	228,646.65	8.21	0.00	22.87	0.01
TOTAL Money Markets		228,646.65		228,646.65	8.21	0.00	22.87	0.01
Cash								
	Principal Cash	0.00		0.00				
	Income Cash	0.00		0.00				
	Total Cash	0.00		0.00	0.00			
TOTAL CASH & EQUIVALENTS		228,646.65		228,646.65	8.21	0.00	22.87	0.01
FIXED INCOME								
Mutual Funds								
30,573.249	DFA INVT DIMENSIONS GROUP INC FIVE YR GOVT PORTFOLIO #10	330,374.40	10.74	328,356.69	11.79	(2,017.71)	1,792.83	0.55
31,725.693	DFA INVT DIMENSIONS GROUP INC ONE-YEAR FIXED INCOME PT #3	327,823.71	10.32	327,409.15	11.76	(414.56)	1,355.33	0.41
32,709.177	DFA TWO-YEAR GLOBAL FIXED INCOME #78	331,816.53	9.93	324,802.13	11.67	(7,014.40)	13,116.40	4.04
29,500.161	DFA 5 YEAR GLOBAL FIXED INCOME	328,598.55	11.08	326,861.78	11.74	(1,736.77)	16,298.25	4.99
TOTAL Mutual Funds		1,318,613.19		1,307,429.75	46.96	(11,183.44)	32,562.81	2.49
TOTAL FIXED INCOME		1,318,613.19		1,307,429.75	46.96	(11,183.44)	32,562.81	2.49
EQUITY								
Int'l Mutual Funds								
International Equity Mutual Funds								
1,429.935	DFA EMERGING MARKETS VALUE #95	41,153.88	25.70	36,749.33	1.32	(4,404.55)	1,800.62	4.90
2,485.114	DFA EMERGING MARKETS SML CAP #90	48,312.10	20.57	51,118.79	1.84	2,806.69	2,113.64	4.13
3,768.949	DFA INTL SMALL COMPANY #89	55,965.45	17.64	66,484.26	2.39	10,518.81	3,932.07	5.91
3,542.125	DFA INTL SMALL CAP VALUE #66	54,342.63	19.47	68,965.17	2.48	14,622.54	3,310.47	4.80
1,517.145	DFA DIMENSIONAL EMERGING MKTS #56	39,248.55	25.41	38,550.65	1.38	(697.90)	795.29	2.06
7,448.047	DFA INTERNATIONAL VALUE #45	121,360.86	18.38	136,895.10	4.92	15,534.24	3,999.01	2.92
TOTAL International Equity Mutual Funds		360,383.47		398,763.30	14.32	38,379.83	15,951.10	4.00
TOTAL Int'l Mutual Funds		360,383.47		398,763.30	14.32	38,379.83	15,951.10	4.00
Mutual Funds								

Montgomery Community College Foundation Investment Management Agency

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Report Period: From 3/1/2015 To 3/31/2015

Units	Description	Cost Basis	Unit Price	Market Value	% Acct	Unrealized Gain/Loss	Estimated Annual Income	Yield At Mkt
Equity Mutual Funds								
8,387.22	DFA US LARGE CAP VALUE #35	146,046.10	33.78	283,320.29	10.18	137,274.19	4,622.36	1.63
7,498.67	VANGUARD GROWTH INDEX ADM VANGUARD INDEX FDS GROWTH	423,000.00	55.39	415,351.33	14.92	(7,648.67)	1,282.27	0.31
TOTAL Equity Mutual Funds		569,046.10		698,671.62	25.10	129,625.52	5,904.63	0.85
TOTAL Mutual Funds		569,046.10		698,671.62	25.10	129,625.52	5,904.63	0.85
TOTAL EQUITY		929,429.57		1,097,434.92	39.42	168,005.35	21,855.73	1.99
<u>REAL ESTATE</u>								
Real Estate								
4,381.153	DFA REAL ESTATE SECURITIES #36	84,275.16	34.34	150,448.79	5.40	66,173.63	5,074.78	3.37
TOTAL Real Estate		84,275.16		150,448.79	5.40	66,173.63	5,074.78	3.37
TOTAL REAL ESTATE		84,275.16		150,448.79	5.40	66,173.63	5,074.78	3.37
GRAND TOTAL ASSETS		2,560,964.57		2,783,960.11	100.00	222,995.54	59,516.19	2.14

Date	Description	Units / Price	Income Cash	Principal Cash	Cost Basis
Beginning Balances			0.00	0.00	2,330,633.77
<u>Investment Activity</u>					
Dividends					
DFA INVT DIMENSIONS GROUP INC FIVE YR GOVT PORTFOLIO #10					
3/10/2015	DIVIDEND			448.20	
	\$0.0147 per Share on 30,573.249 Shares				
DFA INVT DIMENSIONS GROUP INC ONE-YEAR FIXED INCOME PT #3					
3/10/2015	DIVIDEND			112.94	
	\$0.0036 per Share on 31,725.693 Shares				
DFA US LARGE CAP VALUE #35					
3/10/2015	DIVIDEND			1,155.59	
	\$0.1378 per Share on 8,387.22 Shares				
3/11/2015	DIVIDEND			815.44	
	\$0.0972 per Share on 8,387.22 Shares				
DFA REAL ESTATE SECURITIES #36					
3/10/2015	DIVIDEND			1,268.69	
	\$0.2896 per Share on 4,381.153 Shares				
3/11/2015	DIVIDEND			237.76	
	\$0.0543 per Share on 4,381.153 Shares				
FEDERATED US GOVERNMENT OBLIGATIONS FUND FUND NUMBER 5					
3/2/2015	DIVIDEND			0.77	

Montgomery Community College Foundation Investment
Management Agency

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Report Period: From 3/1/2015 To 3/31/2015

Date	Description	Units / Price	Income Cash	Principal Cash	Cost Basis
VANGUARD GROWTH INDEX ADM					
VANGUARD INDEX FDS GROWTH					
3/25/2015	DIVIDEND			1,282.27	
	\$0.171 per Share on 7,498.67 Shares				
Total Dividends		0.00	0.00	5,321.66	0.00
Sale of Asset					
U S VECTOR EQUITY PORTFOLIO					
U S VECTOR EQUITY PORTFOLIO					
3/4/2015	SALE OF ASSET	(21,138.488)		360,411.22	(197,476.43)
	ACQUIRED DISPOSED TERM	FED G/L			
1/29/2010	3/3/2015 LT	139,164.20			
7/25/2011	3/3/2015 LT	1,799.27			
10/25/2011	3/3/2015 LT	12,714.26			
7/25/2012	3/3/2015 LT	5,309.46			
4/25/2013	3/3/2015 LT	2,513.80			
4/8/2014	3/3/2015 ST	138.58			
10/14/2014	3/3/2015 ST	1,295.22			
DFA U S CORE EQUITY 2 PORTFOLIO					
DFA U S CORE EQUITY 2 PORTFOLIO					
3/4/2015	SALE OF ASSET	(12,373.578)		222,600.67	(116,428.55)
	ACQUIRED DISPOSED TERM	FED G/L			
1/29/2010	3/3/2015 LT	94,989.40			
7/25/2011	3/3/2015 LT	717.40			
10/25/2011	3/3/2015 LT	6,007.31			
7/25/2012	3/3/2015 LT	2,170.30			
4/25/2013	3/3/2015 LT	1,522.78			
4/8/2014	3/3/2015 ST	95.54			
10/14/2014	3/3/2015 ST	669.39			
FEDERATED US GOVERNMENT OBLIGATIONS FUND					
FUND NUMBER 5					
3/2/2015	SALE OF MONEY MARKET	(2,112.91)		2,112.91	(2,112.91)
	ACQUIRED DISPOSED TERM	FED G/L			
12/28/2009	3/2/2015 LT	0.00			
3/18/2015	SALE OF MONEY MARKET	(46,460.25)		46,460.25	(46,460.25)
	ACQUIRED DISPOSED TERM	FED G/L			
12/28/2009	3/18/2015 LT	0.00			
3/19/2015	SALE OF MONEY MARKET	(423,125.00)		423,125.00	(423,125.00)
	ACQUIRED DISPOSED TERM	FED G/L			
12/28/2009	3/19/2015 LT	0.00			
Sweep Sales (0) 3/1/2015 To 3/31/2015		0.00	0.00	0.00	0.00
Total Sale of Asset		(505,210.226)	0.00	1,054,710.05	(785,603.14)
Purchases					
FEDERATED US GOVERNMENT OBLIGATIONS FUND					
FUND NUMBER 5					
3/4/2015	PURCHASE OF MONEY MARKET	583,011.89		(583,011.89)	583,011.89
	TRADE DATE: 03/04/2015				
3/11/2015	PURCHASE OF MONEY MARKET	4,038.62		(4,038.62)	4,038.62
	TRADE DATE: 03/11/2015				

Montgomery Community College Foundation Investment Management Agency

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Report Period: From 3/1/2015 To 3/31/2015

Date	Description	Units / Price	Income Cash	Principal Cash	Cost Basis
3/13/2015	PURCHASE OF MONEY MARKET TRADE DATE: 03/13/2015	250.00		(250.00)	250.00
3/25/2015	PURCHASE OF MONEY MARKET TRADE DATE: 03/25/2015	1,282.27		(1,282.27)	1,282.27
3/31/2015	PURCHASE OF MONEY MARKET TRADE DATE: 03/31/2015	4,351.16		(4,351.16)	4,351.16
	VANGUARD GROWTH INDEX ADM VANGUARD INDEX FDS GROWTH				
3/19/2015	PURCHASE OF ASSET TRADE DATE: 03/18/2015	7,498.67		(423,000.00)	423,000.00
Sweep Purchases (0) 3/1/2015 To 3/31/2015		0.00	0.00	0.00	0.00
Total Purchases		600,432.61	0.00	(1,015,933.94)	1,015,933.94

Receipts

Cash Deposits

Date	Description	Income Cash	Principal Cash	Cost Basis
	CASH DEPOSIT			
3/13/2015	CASH DEPOSIT VIA CHECK ENDOWED FUNDS 2/24/2015. CHECK #2290.		125.00	
3/31/2015	CASH DEPOSIT VIA CHECK ENDOWED FUNDS CHECK #2297. 3-6-2015		4,351.16	
Total Cash Deposits		0.00	4,476.16	0.00

Disbursements

Withdrawals & Distributions

Date	Description	Income Cash	Principal Cash	Cost Basis
	CASH DISTRIBUTION			
	MONTGOMERY COMMUNITY COLLEGE FOUNDATION			
3/18/2015	CASH DISTRIBUTION VIA CHECK REQUEST FOR SPRING 2015 SCHOLARSHIP FUNDS PER G. ROATCH		(46,460.25)	
	Fees			
	ADMINISTRATION FEE			
3/2/2015	ADMINISTRATION FEE Collected for Period Ending 2/28/2015		(2,113.68)	
Ending Balances		0.00	0.00	2,560,964.57

February 2015

<u>Amount</u>	<u>Fund</u>
\$220.00	Career and College Promise Program
\$100.00	Computer Information Technologies Program
\$110.00	Continuing Education Art Class
\$15.00	Counseling & Career Development Center
\$5.00	Dental Assisting Program
\$20.00	Early Childhood Program / Scholarship
\$10.00	Forestry Building
\$10.00	Forest Management Technology Program
\$15.00	General Building Fund
\$250.00	General Scholarship Fund
\$100.00	17th Annual Golf Tournament
\$10,000.00	Grede Endowed Scholarship
\$30.00	Gunsmithing Program
\$20.00	Steve Hamilton Memorial Scholarship
\$50.00	Glenn and Lynne Hancock Scholarship
\$35.00	Samantha B. Hussey Memorial Endowed Scholarship
\$25.00	HVAC Program
\$90.00	William "Billy" H. Johnson Jr. Endowed Scholarship
\$10.00	Medical Assisting Program
\$20.00	Minority Male Mentoring Program
\$484.00	Montgomery Bandstand - Dinner - Dancing - Drawing
\$50.00	William (Bill) R. Muse, Jr. Scholarship
\$10.00	Diane G. Nelson Scholarship
\$10.00	Sandhills Dental Assistants Society Scholarship
\$20.00	Student Competition Fund
\$35.00	Trailblazer Shooting Club
\$310.00	Bruce Turner Continuing Education Scholarship
\$12,054.00	

March 2015

<u>Amount</u>	<u>Fund</u>
\$100.00	Gelynda T. and Arron W. E. Capel MSP Endowment
\$500.00	Bear Paw Rifles Merit Scholarship
\$25.00	BLET Program
\$2,300.00	Branson and Lorraine McRae MSP Endowed Scholarship
\$2,000.00	Brownells Gunsmithing Scholarship
\$1,240.00	Gelynda T. Capel Scholarship
\$250.00	Career and College Promise Program
\$60.00	College Transfer AA Program
\$10.00	Computer Information Technologies Program
\$25.00	Continuing Education Art Class
\$15.00	Counseling & Career Development Center
\$10.00	Child Study Club
\$5.00	Dental Assisting Program
\$20.00	Early Childhood Program / Scholarship
\$10.00	Electrical Systems Technology Program
\$75.00	Friends of the Library
\$20.00	GED Testing Fees Assistance Fund
\$10.00	General Building Fund
\$240.00	General Scholarship Fund
\$1,810.00	17th Annual Golf Tournament
\$1,000.00	Margaret & Herbert C. Green Forestry Endowment
\$1,020.00	Gunsmithing Program
\$75.00	Steve Hamilton Memorial Scholarship
\$810.00	Dr. Charles Highsmith Nurses Scholarship
\$10.00	Human Services Program
\$46.16	Samantha B. Hussey Memorial Endowed Scholarship
\$70.00	HVAC Program
\$45.00	William "Billy" H. Johnson Jr. Endowed Scholarship
\$500.00	Gordon and Susan Knowles Endowed Scholarship
\$10.00	Medical Assisting Program
\$70.00	Minority Male Mentoring Program
\$265.00	Montgomery Bandstand - Dinner - Dancing - Drawing
\$40.00	Montgomery Scholars Program Endowed Scholarship
\$50.00	Morgan Hutchinson Scholarship
\$60.00	Diane G. Nelson Scholarship
\$30.00	Riley and Marilyn Phillips Endowed Scholarship
\$225.00	Practical Nursing Pinning Ceremony
\$4,000.00	Theodore C. Sanders Gunsmithing Scholarship
\$10.00	Sandhills Dental Assistants Society Scholarship
\$25.00	Andy Speer Taxidermy Endowed Scholarship
\$5.00	Student Union/Sports Courts
\$145.00	Strong-Thompson Excellence in Forestry Endowed Scholarship
\$15.00	Trailblazer Shooting Club
\$133.00	Bruce Turner Continuing Education Scholarship
\$10.00	Women of Empowerment Program
\$17,394.16	

CCP Enrollment Statistics

Spring 2012

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

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 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 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 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 2014

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

Spring 2015 – in progress

195 students enrolled in 397 classes as of 2/5/15
- several minimester classes are scheduled to
begin in mid-March; additional high school
registrations will be processed for some of those
classes
100 from East, 87 from West, 3 from home
schools, and 5 from Wescare

Beginning with the 2014-2015 academic year, a new CCP pathway for our high school students was added, one that includes Biology 165/166. In the fall of 2014, 37 students enrolled in BIO 165.

Contributions from Other Agencies/Schools	2012SP	2012FA	2013SP	2013FA	2014SP	2014FA	2015SP	TOTALS
Book Buy Backs	-	-	85.00	764.00	-	-	-	849.00
Independent Home Schoolers	-	25.00	25.00	100.00	-	125.00	75.00	350.00
Montgomery County Schools	2,700.00	6,050.00	4,850.00	11,500.00	12,900.00	12,975.00	17,975.00	68,950.00
Montgomery Community College Bookstore	130.00	-	-	-	-	-	-	130.00
Montgomery Community College Foundation	-	-	-	5,000.00	-	16,257.00	-	21,257.00
Reimbursements for Lost Books	-	-	235.15	-	282.79	197.50	176.67	892.11
Wescare Christian Academy	-	-	375.00	400.00	-	-	400.00	1,175.00
Total Contributions per Semester:	2,830.00	6,075.00	5,570.15	17,764.00	13,182.79	29,554.50	18,626.67	93,603.11
Expense for Career and College Promise Books	2012SP	2012FA	2013SP	2013FA	2014SP	2014FA	2015SP	TOTALS
A Book Company, LLC (E-Campus)	-	-	-	25,950.31	15,156.50	884.56	3,779.53	45,770.90
Amazon/ Book Publishers	-	-	151.19	-	-	22,740.45	17,274.52	40,166.16
College Bookstore of America (NEEBO)	2,700.00	4,984.17	-	-	-	-	-	7,684.17
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:	2,700.00	5,073.29	161.77	25,950.31	15,156.50	23,625.01	21,054.05	93,720.93
** NOTE: \$10,000 was contributed from the Montgomery Community College Foundation to start up this program. It was paid directly to CBA MCC Bookstore with the remainder of the balance of \$2,700.00 being paid by Montgomery County Schools in the 2012SP semester.								

2015/2016 Foundation Scholarship Liability Calculations

Need Based Scholarships

Montgomery Scholars

Tuition per Credit Hour	Average Number of Credit Hours	Total Tuition	Fees	Books	Total with Fees	Number of Semesters	Total Cost Per Year	Estimated # of students	Total Need Base Estimate
72.00	12	864.00	51.00	700.00	1,615.00	2	3,230.00	24	\$ 77,520.00

Financial Need

Tuition per Credit Hour	Average Number of Credit Hours	Total Tuition	Fees	Books	Total with Fees	Number of Semesters	Total Cost Per Year	Estimated # of students	Total Need Base Estimate
72.00	12	864.00	51.00	250.00	1,165.00	2	2,330.00	40	\$ 93,200.00

Estimated Need \$ 170,720.00

Estimated Available Funds

Endowed	As of 12/31/2014 75% of earnings from applicable	\$ 60,908.78
Estimated balance in STIF accounts		10,200.00
Total Available		\$ 71,108.78
Prior years Earnings (from General Scholarship Fund)		\$ 99,611.22

Merit Scholarships

Endowed	Scholarship	Amount	Students	Year
	Fidelity Bank Branches: Biscoe, Candor, Star & Troy	500.00	4	\$ 2,000.00
	Bill Maness Family Scholarships	500.00	2	1,000.00
	Zane Simmons Endowed Scholarship	500.00	1	500.00
	Sonny Holt Gilbert A. "Sonny" Holt Memorial Nursing Endowment	500.00	1	500.00
STIF	Hunters Helping Kids	500.00	1	500.00
	Minority Male Mentoring	500.00	1	500.00
	Early Childhood Program / Scholarship	280.00	1	280.00
Merit Estimate			11	\$ 5,280.00

Gunsmithing Scholarships

	Brownells Inc. Scholarships	1,000.00	4	\$ 4,000.00
	Friends of NRA Scholarships	1,000.00	6	6,000.00
	Theodore C. Sanders Gunsmithing Scholarship	1,000.00	4	4,000.00
	NRA Foundation Gunsmithing Scholarship	1,000.00	6	6,000.00
	Bear Paw Rifle Merit Scholarship	500.00	1	500.00
	American Firearms and Shooting Scholarship	1,000.00	2	2,000.00
	American Firearms and Shooting Scholarship	500.00	1	500.00
Gunsmithing Estimate			24	\$ 23,000.00

	Tuition	Books	Merit	Endowed
2014/2015 Endowed Funds Liability Estimate:				
24 MSP, 45 Financial need	126,270.00	56,100.00	4,000.00	186,370.00
2014/2015 Endowed Funds Actual:				
13 MSP, 40 Financial need	86,860.51	30,523.54	4,000.00	107,791.00

**MCC FOUNDATION OPERATING BUDGET
FY 2014-15**

	Jul-Sept 1st Qtr.	Oct-Dec 2nd Qtr.	Jan-Mar 3rd Qtr.	<i>Estimated</i> Apr-Jun 4th Qtr.	Year-to-Date	Expenses		Revenue	
						2014-2015 Budget	Amount Remaining	Goals 2014-2015	Actual 2014-2015

Fundraising Events

Raffle/Dinner Show	\$71.80	\$7,864.00	\$100.00		\$8,035.80	\$7,500.00	-\$535.80	\$23,500.00	\$19,959.20
Golf Tournament (April)			\$124.61	\$5,375.39	\$5,500.00	\$5,500.00	\$0.00	\$13,500.00	\$13,500.00

Other Funds Available

End of year projected balance (roll over)								\$20,000.00	\$2,297.06
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Expenses

Ambassador Scholarship/Blazers (4 @ \$1500)*	\$2,500.00		\$2,000.00	\$2,000.00	\$6,500.00	\$6,500.00	\$0.00	\$1,300.00	\$1,300.00
Mini-Grants				\$2,500.00	\$2,500.00	\$2,500.00	\$0.00		
Professional Development Awards (2 @ \$750)			\$715.00	\$410.00	\$1,125.00	\$1,500.00	\$375.00		
Annual Audit		\$3,950.00			\$3,950.00	\$4,000.00	\$50.00		
Friend Raisers		\$161.92			\$161.92	\$800.00	\$638.08		
Diversity Day		\$300.00		\$400.00	\$700.00	\$700.00	\$0.00		
Awards Ceremony (August)	\$299.38				\$299.38	\$800.00	\$500.62		
Donor Appreciation (November)			\$236.47	\$700.00	\$936.47	\$3,000.00	\$2,063.53		
Donor/Endowment Wall Maintenance		\$316.06		\$250.00	\$566.06	\$700.00	\$133.94		
Annual Fund Drive			\$640.00	\$660.00	\$1,300.00	\$1,300.00	\$0.00		
Miscellaneous/contingency	\$402.55	\$543.35	\$676.08	\$160.00	\$1,781.98	\$1,000.00	-\$781.98		
Insurance	\$1,343.00				\$1,343.00	\$1,500.00	\$157.00		
MLK Day On Challenge			\$892.45		\$892.45	\$1,000.00	\$107.55		
Occupational Scholarships	\$5,439.60	\$995.60	\$2,381.60	\$1,183.20	\$10,000.00	\$10,000.00	\$0.00		
College and Career Promise Books		\$5,000.00			\$5,000.00	\$5,000.00	\$0.00		
Total	\$9,984.53	\$11,266.93	\$7,541.60	\$8,263.20	\$37,056.26	\$40,300.00	\$3,243.74	\$58,300.00	\$37,056.26

Excellence in Teaching - Mark Dye

Staff Member of the Year - Dot Wilkes

*\$800 from SGA towards Ambassador Scholarships + \$500 Rollover for A. Midkiff

**MCC FOUNDATION PROPOSED OPERATING BUDGET
FY 2015-16**

MCC FOUNDATION STRAW BUDGET FY 2015-16					MCC FOUNDATION BUDGET FY 2014-15	
Revenue:	Gross Revenue	Expenditures	NET Revenue Expectation	Explanation	Net Revenue Actual/Estimate	Expenditures 2014-2015 Actual/Estimate
Fundraising Events						
Raffle/Dinner Show	\$31,000	\$7,500	\$23,500		19,959.20	8,035.80
Golf Tournament	19,000	5,500	13,500		13,500.00	5,500.00
Other Funds Available						
Projected End of year 2014/15 Fiscal Rollover			20,000	2013/14 Rollover used	2,297.06	
Expenditures:						
Ambassador Scholarship due from SGA		6,000	800	Remains the same (FY2014-15 has \$500 rollover for Summer 2014 for A. Midkiff)	1,300.00	6,500.00
Mini-Grants		2,500		Remains the same		2,500.00
Professional Development Awards (2 @ \$750)		1,875		Includes \$375 carry over for 2nd year Lynda.com (Dot Wilkes 2014)		1,125.00
Annual Audit		4,000		Remains the same		3,950.00
Friend Raising		1,000		Remains the same		161.92
Diversity Day		700		Remains the same		700.00
Awards Ceremony (August)		1,000		Increase to promote donor attendance		299.38
Donor Appreciation		1,000		No longer doing Donor Appreciation Event, however, this line item can be used for other items, perhaps in connection with Alumni program		936.47
Donor/Endowment Wall Maintenance		425		2014/15 budgeted \$700, recommend dropping because . .		566.06
Annual Fund Drive		1,500		Increase to promote new president meet and greets		1,300.00
Miscellaneous/contingency		2,000		Board Meeting Meals, Christmas Cards, Troy Rotary Golf Tournament, Baby Scholarship		1,781.98
Insurance		1,500		Remains the same		1,343.00
MLK Day on Challenge		1,000		Remains the same		892.45
Alumni Program		2,500		New line item		
Occupational Scholarships		10,000		Remains the same		10,000.00
College and Career Books		5,000		Remains the same		5,000.00
Total		\$42,000	\$57,800		37,056.26	37,056.26
Anticipated End of 2015/16 Fiscal Rollover	\$15,800					



Mini-Grant Proposal Application

Name of Project MCC Open House

Amount of Funding Requested \$2,500.00

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 Michele Haywood

Brief description of grant project:

MCC is planning an open house to coincide with the new president inauguration on May 16, 2015. The event will showcase MCC's programs and facilities. Food will be provided along with music, games and children's rides. It is our goal to bring our community to our campus.

All remaining expenses will come from college funds using the vending account.

All budget items are rough estimates.

Expected Budget:

Item	Estimated Cost
Food	\$5,000.00
Entertainment/Music	\$2,500.00
Tents/Decoration	\$1,000.00
Total	\$8,500.00

~~Supervisor~~ Michele Haywood Date 3/31/15

Vice President _____ Date _____

President May A. Elise Date 3-31-15

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

Open House Committee Meeting
Thursday, March 26, 2015
Minutes

Members Present:

Cindy Ellison, Michele Haywood, Claudia Bulthuis, Deborah Ashby, Beth Smith, Gay Roatch, Riley Beaman, Andrew Gardner, Jeanette McBride and Korrie Ervin.

Proposed Date

The group proposed a date of Saturday, May 16 for the Open House. Replacement of the multipurpose room walls will begin Tuesday, May 26. Saturday, May 23 falls on the Memorial Day weekend, and Saturday, May 16 will be better for instructors who will be off during the summer.

Inauguration

MCC Board Chair, Claudia Bulthuis, said that she envisioned the Presidential inauguration taking place on the same day as the open house and have an ice cream social afterward. She thought that invitations should be sent out but no firm numbers could be decided upon as yet. However, after discussing the seating available in the multipurpose room (800) she stated that the inauguration could probably be open to any who wished to attend. This matter will be discussed more at a later meeting.

Schedule

The group proposed a start time of 10 a.m. with the following schedule: (All times are tentative)

10:00 a.m. Music, inflatables, and activities begin

11:00 a.m. Campus tour of programs

12:00 p.m. Food served, live band begins

1:00 p.m. Campus tour of programs

1:00 p.m. Movie in Blair Auditorium

2:00 p.m. Discontinue serving lunch, live band finished, inflatables finished

3:00 p.m. Movie finished

4:30 p.m. Presidential inauguration & ice cream social

Budget

Jeanette McBride said the only source of funding from the institutional budget would be from vending, and that has been depleted due to funding the presidential search. Riley Beaman said the SGA agreed to free up some funds for entertainment, but he did not know the amount. Gay Roatch said there was a small amount available for the annual fund drive that the Foundation was going to use for 'meet and greet' activities for the new president. Jeanette said it would be better to put together a proposed budget first to see how much money we would need, and then decide where we would have to scale back based on available funds.

Activities

Committee discussed various activities to be held outdoors including an inflatable; gaming trailer; music (DJ); live band; lunch; other possible food items; interactive, hands-on displays by programs that could possibly be left unattended; one or two scheduled tours of programs (so instructors would only have to be in their classrooms at certain designated times); face painting; a movie in the Blair Auditorium; Outpost will be open to the public; corn hole games; farmer's market.

Committee Responsibilities

The following members will be looking into costs for the following activities:

Live band – (Southbound 49, Sand Band, Loaded Dice, Noralina . . .) Michele Haywood/Gay Roatch to call the Sand Band

Food – (Jordan's, chicken and BBQ with fixings) Korrie Ervin

Inflatable slide - Michele Haywood

DJ – Riley Beaman

Movie, Farmer's Market – (partner with Town of Troy) Riley Beaman

Face Painting – (Check with Darlene Brown & see if she wants to partner with Partnership for Children) Deborah Ashby/Riley Beaman

Tent – Cindy Ellison

Gaming Trailer – Riley Beaman

Fingerprinting for kids – (contact Chris Watkins) Deborah Ashby

Montgomery County Schools – (see if they want to have a table) Andrew Gardner

Presidential inauguration & ice cream social – Claudia Bulthuis

Committee members will contact their sources and decide on the cost for what we want vs. lesser expensive alternatives and turn that in to Gay Roatch before April 1. Gay will compile a budget and present it to the Foundation Board on April 8.

Next Meeting

Michele will send out a Doodle poll for the next meeting, which will be after April 8.

There being no further business, the meeting adjourned.

Respectfully submitted by,
Michele Haywood

Alumni Update

Access Data Base –

- Loaded information on students receiving certificates, degrees or diplomas for years 2011 through 2014. Total of 704 curriculum student records found.
- Carol and I are working on developing the best search criteria for reports. These reports are delivered to me via excel and I can import them into the data base.
- Developing report to capture Continuing Education records.
- Currently have to manually add scholarship information; in the future can upload this information.
- Need updated information, see quote from AlumniSync, 1,400 records for \$392

Contact to date –

- Sent out Golf Tournament email, sent 541, reject on 79 addresses, 0 responses

Ideas for building program –

- Booth at the open house, get sign-up sheets, give away lapel pin
- Need to develop guidelines for interaction with alumni and program offering
- Create MCC Alumni Linked in
- Create an MCC Alumni email address
- Communicate via mass mailing and emailing



March 26, 2015

Gay Roatch
Montgomery Community College

Dear Gay:

Thank you for considering AlumniSync for your data append needs. The following information should give you a better understanding of how our services work and how we price them.

AlumniSync provides the most accurate and actionable information for use in locating lost alumni, enriching alumni profiles and identifying other friends and supporters.

A Solution Built For Today's Higher Education Institutions

AlumniSync was formed because we saw an opportunity to deliver higher quality data at a lower price and in a manner that better fits the way Universities, Colleges and other non-profits operate. We've invested in technology and processes that allow us to offer a better price point with improved data accuracy.

In spite of technology advances choices to find lost alumni and other data appends have remained low while costs have stayed high. Innovations from AlumniSync change this dynamic.

- Only AlumniSync multi-processes through the leading data providers to maximize match rates. Other vendors simply resell data from one source. Leveraging multiple vendors allows us to consistently outperform our competition. That's why we're the only vendor that welcomes head-to-head testing.
- AlumniSync uses the industry leader, LexisNexis® Accurint, TLO and other innovative data sources to provide our clients with the most innovative solution in the Industry.
- At AlumniSync we're committed partners with our clients. Whether it's working with limited data inputs or aggregating multiple files into one master, we welcome the opportunity to solve your specific data problems.
- Our pricing is based on input regardless of the project outcome. At AlumniSync you pay only for the data we deliver back. We call it success-based pricing. We've also eliminated files fees and minimums. This is why you're likely to see savings of as much as 30%.
- Other vendors take weeks to process files using older programs and single vendors. You'll receive your enhanced files back in days, not weeks. Our technology allows us to process your files quickly regardless of the format. Leveraging our multiple vendor and multiple pass solutions, we run your file up to six times through our data partners to ensure the highest degree of accuracy with the greatest number of matches. Most firms stop after the first pass, regardless of the outcome. AlumniSync guarantees your file has been processed multiple times.





Our Company

The founders of our company have well over 40 years of experience delivering data and technology to the higher education community. We're using what we've learned to build a client-focused company that delivers the best value at the lowest price.

David Manuel: Former National Sales Director at Prospect Information Network, WealthEngine and AlumniFinder. Dave was also a Director of Major Gifts at Purdue University and Director of Annual Giving at both Wabash College and Butler University.

Brad Braddock: Former SVP Marketing and General Manager of the Arts & Cultural Division at Blackbaud. Brad recently was President of an online market research firm and has served as VP of Marketing and Strategy at several CRM software companies.

Shaun Sullivan: Former CTO of Blackbaud. In addition to being the lead architect for the company's flagship product Shaun designed the data enrichment integration platform and drove Blackbaud's technical direction and application of emerging technologies.

Methodology:

With access to industry leading data firms, our batch process analyzes millions, of records at a time. AlumniSync Batch Solutions are the quickest, most cost-effective way to enhance your large data files with current address, phones, deceased records, and more. AlumniSync is the most powerful database for background research on people and businesses. Our data is comprised of trillions of public and proprietary records, with historical address data going back over 30 years.

- We run your file multiple times through multiple vendors, to achieve the best results possible.
- Processing takes days, not weeks.
- Data testing is paramount to our solutions. Most firms rely on one vendor for their solution, regardless of the project. Through our extensive and continuous testing we have discovered that each of our vendors has a specialty data solution that performs better than another provider. By continually testing vendors and combining solution sets, AlumniSync offers the best market solution to our clients. No other firm puts this emphasis on testing.

The Data:

We locate the most current address and phone number information quickly, even when other firms cannot. Head to head vendor tests prove that AlumniSync delivers more actionable data than any other vendor.

Our technology leverages over 37 billion public and proprietary records from more than 10,000 diverse sources.

- 8.5 billion unique name/address combinations
 - Unlike NCOA our address information going back decades
 - We take into consideration changes in last name





- Unlike other firms we can match on partial or full SSN
- 552 million phone numbers
 - Real time data with the majority of numbers verified within the last 48 hours
 - Unlike cheaper service, we match to changes in last name and old addresses
 - We return the most current phone number possible
- 178 million unique cell phones
 - We return the most current cell phone number using LexisNexis® Accurint data
- Business Information
 - We leverage everything from home addresses and birthdates to bring back the most accurate data possible
 - Our LinkedIn Append uses graduation date for confirmation, most firms do not.

Scope of Service:

Montgomery Community College is considering running an estimated 1,400 records through our Locator/LinkedIn Bundle and Cell Phone Append.

Solution & Services:

We are the only multisource multi-pass vendor for locating lost alumni. We partner with both the industry standard, LexisNexis® Accurint, and TLO as well as other big data sources to leverage over 40 years of past names and addresses. We have the ability to locate a person using an old address and birthdate to provide the most current known information. Our other partners include the largest email provider to the non-profit community as well as data providers pioneering new services with LinkedIn matching gifts and other services.

Locator Service

- We are the only company to multi-source data.
- Multiple passes are run through each vendor, most firms only run a file once

Locator Service includes the following elements returned:

- Updated addresses through historical locator service
- Last name changes that may have occurred
- Best Phone Service
 - Appending up to the three best phone numbers for that person
 - Phone 1, phone 1 type
 - Phone 2, phone 2 type
 - Phone 3, phone 3 type
- Deceased with Date of deceased
- Date of birth





Cell Phone

- We use LexisNexis® Accurint, the proven industry leader in cell phone append data
- 40% append rate on average, the highest in the industry with the maximum degree of accuracy

Phone Append

- We leverage both current and past address information for current phone numbers
- Landlines as well VoIP's are provided
- Changes in last name are also tracked and used for matching

Employment Append

- We leverage over 130,000,000 state and federal business filings
 - Only records matching full name and home address are returned for this data
- Personal data returned includes
 - Company email address for that person
 - Title for that person
- LinkedIn data is used leveraging name, city, state and degree if possible
 - LinkedIn URL is returned with company name, title, industry and region as well as start and duration
- Business information is returned
 - Company URL

Online Tool

- Provides individual look ups to find lost alumni and other constituents
 - Cost is based on results on a search by search basis





Success Based Pricing:

Leveraging multiple data sets along with increased algorithm functionality allows us to competitively price our services. Our Success Based Pricing model means you only pay for the data you need.

Locator Service with LinkedIn Bundle

Record Count	Batch Service:	Price Per Match	Estimated Hit Rate	Cost
1,400	Locator Service	\$0.25	80%	\$280
1,400	LinkedIn Append	Included	15%	\$0
1,400	Landline Append	Included	70%	\$0
1,400	Last Name Change	Included	30%	\$0
1,400	Deceased Append	Included	5%	\$0
1,400	Birthdate Append	Included	70%	\$0
1,400	NCOA-48 Month	Included	2%	\$0

LinkedIn Includes: Constituent's Link, Company, Title, Industry, Region and Employment Duration.

Cell Phone Append

Record Count	Batch Service:	Price Per Match	Estimated Hit Rate	Cost
1,400	Premium Cell Phone Append	\$0.20	40%	\$112





AlumniSync Customer Support is included in our fee. Clients only pay for delivered data.

- No minimum orders
- No processing fees
- No charge for processing multiple files
- No charge for flagging possible multiple records
- No charge for custom layout on returned files
- No charge for multiple customized files returned
- No charge for customized reports

Project Timeline:

Once a File has been received, standard processing takes 3-5 business days.

LinkedIn Appends may require a processing time of 2-3 weeks depending on alumni information provided. I have included the input specifications below for your review. If you have any questions regarding the information I have provided, please do not hesitate to give me a call. Thank you for your consideration.

Turner Heron
turner@AlumniSync.com
(843) 906-1593





AlumniSync data experts will work with your data in any file layout that works best for you. We accept most exports from CRM systems.

File Input Specifications:

- 1. File Name:** Please name each file after your school with something that's reasonably descriptive (example: University of America Lost Donors).

- 2. File Format:** AlumniSync can accept almost all file formats available
 - Comma Separated Value (CSV)
 - Text
 - Tab Delimited

- 3. Record Layout:** We would much prefer one consistent layout for all files sent.

- 4. Field Requirements:** Include as many of the following fields as you can with complete information. The sequence of the fields can be arranged as you wish.
 - Record ID (must be unique for each record)
 - First name
 - Middle Name or initial
 - Last Name
 - Address 1
 - Address 2
 - City
 - State
 - Zip Code
 - Age, birthdate
 - Year of Graduation

Fields that will help in matching but are by no means required:

- Name Prefix
- Name Suffix
- Social security number
- Phone number
- Cell phone number
- Other, or previous known name of School

- 5. Returned File** AlumniSync will always return your data in the format that it was received unless otherwise specified in the contract terms and conditions. Each file returned will always return the input data in the same columns it was received. Appended data is then "added" to the data in subsequent "columns" and marked appropriately.



Quotes For Lapel Pins: 3/4" Cloisonne

Company	Qty.	Per Pin	Printing Plate	Total	Shipping
PinMart	500	1.56	40.00	820.00	Free
Lapel Pin Super Store	500	1.36	57.50	737.50	Free
Pinacle Pins Hampstead, NC	500	1.29	0	645.00	Free
LapelPins.com (Natal Custom Insignia, Inc.) Oldsmar, FL	500	1.08	0	540.00	Free

Graduates of MCC will receive a pin after graduation when all grades are submitted and final. Beth Smith will provide me with a list of names and mailing addresses. This is an opportunity to include something about the Foundation and Alumni initiative. Each graduate will receive only one pin.

Working with Carol Holton in developing reports to gather Continuing Education student information.

ART PROOF

REF.#: J030415-1 Date:

Attn:

From:

SIZE MAY VARY DEPENDING ON YOUR COMPUTER



Nickel Metal



PMS 2765 C

PLEASE CHECK CAREFULLY.
WE ARE NOT RESPONSIBLE FOR ANY
INACCURACIES AFTER ARTWORK IS APPROVED.



Actual Size: .75"

PLEASE NOTE: COLORS IN MOCK-UP DO NOT ACCURATELY REPRESENT COLORS OF FINISHED PIECE.



Foundation Occupational Scholarships Paid

Appendix K.1

As of March 2, 2015

Date Paid	Name	Course	Course Start Date	Course End Date	Course Costs	Paid by Student	Paid by Occupational Scholarship
9/24/2014	Monica R. Alvarez	NA Level II	8/18/2014	10/30/2014	312.60	212.60	100.00
9/24/2014	Santiago R. Alvarez	Introduction to Welding	9/8/2014	12/6/2014	201.60	101.60	100.00
9/24/2014	Lynn M. Bolen	NA Level II	8/18/2014	10/30/2014	352.60	172.60	180.00
9/24/2014	Carson A. Bruton	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	81.60	100.00
9/24/2014	Gary E. Callicutt	Intermediate Welding	8/18/2014	12/6/2014	201.60	21.60	180.00
9/24/2014	Ricky W. Cecil	Workplace Safety	8/14/2014	12/16/2014	70.00	0.00	70.00
9/24/2014	Christopher W. Chappel	Intermediate Welding	8/18/2014	12/6/2014	201.60	21.60	180.00
9/24/2014	Dinah B. Coley	NA Level I - Day/Hybrid	8/18/2014	10/27/2014	340.60	240.00	100.60
9/24/2014	Michael W. Dawkins	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	81.60	100.00
9/24/2014	Mandy M. Georgepul	NA Level I - Night/Hybrid	8/18/2014	10/27/2014	340.60	160.60	180.00
9/24/2014	Letia M. Graham	NA Level I - Night/Hybrid	8/18/2014	10/27/2014	340.60	145.00	195.60
9/24/2014	Michael C. Griffin	Introduction to Welding	9/8/2014	12/6/2014	201.60	0.00	201.60
9/24/2014	William D.Jordan	Introduction to Welding	9/8/2014	12/6/2014	201.60	21.60	180.00
9/24/2014	Crystal W. Kern	NA Level I - Night/Hybrid	8/18/2014	10/27/2014	340.60	160.60	180.00
9/24/2014	Tracey A. Lemonds	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	81.60	100.00
9/24/2014	Eva J. Lineberry	NA Level I - Night/Hybrid	8/18/2014	10/27/2014	340.60	145.00	195.60
9/24/2014	Gabriel L. Lopez	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	1.60	180.00
9/24/2014	Scotty L. Moore	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	1.60	180.00
9/24/2014	Jared Morton	Introduction to Welding	9/8/2014	12/6/2014	201.60	101.60	100.00
9/24/2014	Eric A. Samsombath	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	1.60	180.00
9/24/2014	Miguel Soto	HVAC Air Condition Systems	8/18/2014	12/15/2014	181.60	81.60	100.00
9/24/2014	Maria D. Soto Oliver	NA Level II	8/18/2014	10/30/2014	322.60	222.60	100.00
9/24/2014	Garcia Thomas	NA Level I - Day/Hybrid	8/18/2014	10/27/2014	340.60	145.00	195.60
9/24/2014	Sherry C. Atkins	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Revonda A. Biggers	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Taylor A. Blake	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Crystal F. Christiana	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Daniella L. Leake	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Samantha N. Russell	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Beverly N. Scott	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Jennie A. Sherer	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	330.00	80.60
9/24/2014	Michael S. Sherer	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Cecilie J. Sturdivant	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Courtney A. Sturdivant	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
9/24/2014	Ashley A. Williams	Phlebotomy Education & Clinical	8/25/2014	2/28/2015	410.60	230.60	180.00
11/10/2014	Christopher W. Chappel	E-P-A Refrigerant Certificate	10/16/2014	11/6/2014	70.00	0.00	70.00
11/10/2014	Shirley Horne	NA Level I - Day	10/28/2014	12/14/2014	340.60	105.00	235.60
11/10/2014	Cres Stephens	E-P-A Refrigerant Certificate	10/16/2014	11/6/2014	70.00	0.00	70.00
12/10/2014	Michael W. Dawkins	E-P-A Refrigerant Certificate Evening E	11/18/2014	12/15/2014	70.00	0.00	70.00
12/10/2014	Richard F. Jordan	E-P-A Refrigerant Certificate Evening E	11/18/2014	12/15/2014	70.00	0.00	70.00
12/10/2014	Tracey A. Lemonds	E-P-A Refrigerant Certificate Evening E	11/18/2014	12/15/2014	70.00	0.00	70.00
12/10/2014	Terell A. Marshall	HVAC Refrigeration	10/20/2014	12/16/2014	251.60	81.60	170.00
12/10/2014	Joshua H. Pederson	E-P-A Refrigerant Certificate Evening E	11/18/2014	12/15/2014	70.00	0.00	70.00
12/10/2014	Omar Rodriguez	HVAC Refrigeration	10/20/2014	12/16/2014	251.60	81.60	170.00
2/4/2015	Jonathan J. Blow	Intro to Welding	1/12/2015	5/6/2015	201.60	101.60	100.00
2/4/2015	Renee Britt	Nurse Aide Level I-Night	1/12/2015	5/12/2015	340.60	240.60	100.00
2/4/2015	Ramon L. Corral	HVAC Servicing	1/15/2015	5/7/2015	181.60	81.60	100.00
2/4/2015	Ramon L. Corral	Heating Technology	1/12/2015	3/4/2015	181.60	81.60	100.00
2/4/2015	Michael W. Dawkins	HVAC Heating & Air Condition	1/12/2015	5/6/2015	181.60	81.60	100.00
2/4/2015	Bobbie M. Graham	Nurse Aide Level I-Night	1/12/2015	5/12/2015	340.60	240.60	100.00
2/4/2015	Michael C. Griffin	Intro to Welding	1/12/2015	5/6/2015	201.60	0.00	201.60
2/4/2015	Donna L. Hunsucker	Nurse Aide Level I-Night	1/12/2015	5/12/2015	340.60	240.60	100.00
2/4/2015	Richard F. Jordan, Jr.	HVAC Heating & Air Condition	1/12/2015	5/6/2015	181.60	81.60	100.00
2/4/2015	Nichole D. Lilly	Nurse Aide Level I-Night	1/12/2015	5/12/2015	340.60	240.60	100.00
2/4/2015	Terrell A. Marshall	HVAC Servicing	1/15/2015	5/7/2015	181.60	81.60	100.00
2/4/2015	Terrell A. Marshall	Heating Technology	1/12/2015	3/4/2015	181.60	81.60	100.00
2/4/2015	Jose A. Perez	HVAC Servicing	1/15/2015	5/7/2015	181.60	81.60	100.00
2/4/2015	Jose A. Perez	Heating Technology	1/12/2015	3/4/2015	181.60	81.60	100.00

Foundation Occupational Scholarships Paid

As of March 2, 2015

2/4/2015	Omar Rodriguez	Heating Technology	1/12/2015	3/4/2015	181.60	81.60	100.00
2/4/2015	Tyler D. Thompson	HVAC Servicing	1/15/2015	5/7/2015	181.60	81.60	100.00
2/4/2015	Tyler D. Thompson	Heating Technology	1/12/2015	3/4/2015	181.60	81.60	100.00
3/2/2015	Pamela M. Baldwin	Phlebotomy Experience & Clinic	1/12/2015	7/31/2015	410.60	230.60	180.00
3/2/2015	Lynn M. Bolen	Phlebotomy Experience & Clinic	1/12/2015	7/31/2015	410.60	310.60	100.00
3/2/2015	Cecilie J. Sturdivant	Phlebotomy Experience & Clinic	1/12/2015	7/31/2015	410.60	310.60	100.00
3/2/2015	Bo D. Cook	Intro to Welding Mig, Tig, Stig	2/2/2015	5/6/2015	201.60	101.60	100.00
3/2/2015	Cres Stephens	HVAC Heating & Air Condition	1/12/2015	5/6/2015	181.60	81.60	100.00

66 Scholarships Awarded**Total Dollars Awarded** 8,816.80**Balance Remaining** 1,183.20

MLK Day Challenge

Monday, January 19, 2015

MCC Foundation				\$1,000.00
Date	Vendor	Amount	Description	Remaining
1/13/2015	Top Dog Embroidery	677.39	T Shirts	322.61
2/10/2015	First Bank cc	65.06	Paper Products	257.55
2/15/2015	Council on Aging	150.00	Soup Kitchen Lunches	107.55

Cash Donations				\$600.00
2/11/2015	Montgomery County Council on Aging	600.00	Food Trucks for Distribution	\$0.00

In Kind Donations		
1/19/2015	BoJangles	Biscuits
1/19/2015	Montgomery County Schools	Activity Buses
1/19/2015	Pepsi Co	Water



MCC Foundation Golf Tournament 2015

Estimated Budget

Appendix M

Target 20 Teams - confirmed 11 Teams

	Revenue	Cost	Profit
Beverages			\$ -
Players \$85/\$23 each	6,120.00	1,840.00	4,280.00
Gift Certificates		810.00	(810.00)
Brochures		124.62	(124.62)
Goodie Bags		50.00	(50.00)
Meals (60) @\$10		600.00	(600.00)
Room Cleanup		80.00	(80.00)
Signs & Banners		265.00	(265.00)
Mulligans, Tee, Toss <small>Assume 75%</small>	1,200.00		1,200.00
Raffle <small>Assume 75%</small>	300.00		300.00
Cash Donation			-
Corporate Sponsors (\$2500)	2,500.00		2,500.00
Tournament Sponsors (\$1000)	1,000.00		1,000.00
Friend of Foundation (\$500)	500.00		500.00
Hole Team Sponsors (\$100)	2,400.00		2,400.00
Total	\$ 14,020.00	\$ 3,769.62	\$ 10,250.38

In Kind Donations

Montgomery Foods, Inc./Food King	10 Cases Beer	InKind
Mid South Food Service	Lunches, sodas, water	InKind
FirstHealth	Goodie Bags and item	InKind
NAPA	Car wash bucket	InKind
Advance Auto Parts	Car wash bucket	InKind
Caroline's		InKind
Granny Bs	Gift Certificate	InKind
Antique Mall		InKind
Troy Flower Shop	Flag with pole	InKind
White Star	Fishing reel for raffle	InKind
Town of Troy	Round of Golf	InKind
Edward Jones	Things for Goody Bags	InKind

Golf Tournament Profit by Year		# Teams	# Sponsors
2014	\$ 10,316.15	15	1 Tournament 3 Friend of Foundation 41 Hole Sponsors
2013	\$ 13,000.88	18	1 Corporate Sponsor 2 Tournament 1 Friend of Foundation 47 Hole Sponsors



**Densons Creek
Golf Course**

For the 17th Annual
Montgomery Community College
Foundation
Golf Tournament

**Friday
April 17
2015**

Calendar of Foundation Events

2015

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
-  April 17, Friday, Golf Tournament
-  February 3, Tuesday, Internal AFD Kick Off Lunch
-  May 13, Wednesday, MCC Graduation
-  MLK Day On Challenge
-  May 16, Saturday, MCC Open House
-  August 10, Monday, Awards Ceremony, 5:30 p.m.

Dates are subject to change

 September 18 or October 1, Back to the Beach with the Sand Band Dinner Show & Raffle

2016

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	29					

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		

Upcoming Grants

Grantor	Title	Proposed Purpose	Length	Max Amount	Critical Dates
Golden Leaf	Community Assistance Initiative for Prosperity Regions - Information meeting 8/28/14 Sandhills Prosperity Zone: Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, and Scotland.	Funds could be used to pursue similar activity as the DOL grants, remodel, refurbish and equip Building Requires 20% Cash match. Can combine with the Duke Energy Grant to help meet the match as well as outside donation opportunities	TBD	\$1.5M per county in prosperity zone, County Manager to endorse	Letter of Inquiry submitted 12/1/14 Add'l info submitted 1/7/15 Review meeting 1/15/15 Invite to submit 2/5/15 Proposal due 3/13/15 Determination 6/5/15
Montgomery Fund	Cameras for Summer Youth Program	Purchase Nikon Coolpix L32 20.1 MP digital camera \$120/ea. \$720.00 and SanDisk 32GB Extreme UHS-1 U3 SDHC memory card \$22/ea. \$132.00 = Total \$852.00	1 Year	requesting \$852	Due April 7th
Montgomery Fund	Made in Montgomery County Video	Video directed at youth to help them get excited about jobs in our county and programs at MCC. To be developed in partnership with Montgomery County Schools.	1 Year	requesting \$4100	Due April 7th

Grants Awarded 2014-2015 Fiscal

Grantor	Title	Purpose	Length	Amount Awarded	Grant Due	Response	
Duke Energy	Community College Grant Program	Industrial Systems Technology Equipment & Renovations	2 year	\$250,000	12/31/2014	Awarded 3/3/15	
NC Dept. of Environment & Natural Resources	Prescribed Fire Burning Grant		1 year	\$25,000	9/1/2014	Awarded October 2014	
NCCCS	Minority Male Mentoring Program Active, intensive, and engaging process of academic coaching and case management that provides early access and academic support to minority male students with an increased likelihood of		1 year	\$15,228	6/30/2014	Awarded September 2014	
Palmer Foundation	Project Lead the Way	Curriculum & Equipment	BIO 165 & 166	2 years	\$50,000	3/12/2014	Awarded May 2014 Palmer Foundation to review deviation to use remaining funds for CCP Books 3/4/15
Montgomery Fund	Career & College Promise	Books	Curriculum	1 year	\$2,000	3/31/2014	Awarded May 2014

Grants in Denied 2014-2015 Fiscal

Grantor	Title	Purpose	Length	Max Amount	Grant Due	Response expected
Carl D. Perkins Career and Technical Education Act of 2006	NCWorks Career Pathways	Submitted proposal to hire a Part Time Permanent Career Pathway Coordinator/Coach to work with MCC, MCS, Apprentices and Employers	2 years	\$70,000 - \$35,000 each year	10/1/2014	10/1/2014 DENIED
Department of Labor	Piedmont Triad Manufacturing Community TAACCCT Consortium (PTMCC)-Forsyth Tech Lead College Trade Adjustment Assistance Community College and Career Training Grant Program (DOLTAACCCT) Round 4	This proposal seeks funding to expand training for industry certifications and program options for TAA-eligible workers and other adult learners. MCC funds are planned to be used for remodel, refurbish and equip Building 100.	4 years	\$10 million + for consortia of 10 members MCC Portion \$1,042,069.	7/3/2014	9/30/2014 DENIED
Department of Labor	Sandhills, Central Carolina & Montgomery Consortium-Sandhills Lead College Trade Adjustment Assistance Community College and Career Training Grant Program (DOLTAACCCT) Round 4	This proposal seeks funding to expand training for industry certifications and program options for TAA-eligible workers and other adult learners. MCC funds are planned to be used for remodel, refurbish and equip Building 100.	4 years	\$10 million for consortia of 10 members MCC Portion \$1,822,989	7/3/2014	9/30/2014 DENIED

Annual Fund Drive Comparison of Contributions by Quarter As of March 31, 2015

AFD Goal for 2015: \$125,000 in money received and \$30,000 in pledges

	2015	2014	2013	2012	2011	2010
January - March	\$26,679.16	\$26,857.81	\$215,623.37	\$104,689.73	\$36,508.72	\$64,788.52
April - June		\$45,296.60	\$21,545.02	\$65,114.77	\$32,377.99	\$42,634.50
July - September		\$14,692.98	\$27,360.34	\$20,367.30	\$70,434.47	\$50,536.38
October - December		\$19,385.00	\$50,780.00	\$17,022.46	\$30,992.11	\$66,898.32
TOTAL	\$26,679.16	\$106,232.39	\$315,308.73	\$207,194.26	\$170,313.29	\$224,857.72

Pledges Made in 2015 for New Scholarships

\$10,000 Strong-Thompson Excellence in Forestry Endowed Scholarship

\$10,000 James L. Dunlap, Sr. Memorial Endowed Scholarship

Internal Annual Fund Drive: 98% employees contributing