



mount vernon/ knox county community trust

2001 annual report



# community

Dear Friends of the Community Trust,

The 12-month period ending December 31, 2001, was for the Mount Vernon/Knox County Community Trust a year which set the stage for deliberate and significant change. As it went about its business encouraging philanthropy and distributing more than \$732,000 for scholarships and worthy community projects, the Trust also devoted many hours to the task of reshaping itself. By year-end it had expanded its volunteer board and had established a committee structure that is better suited to its mission.

As we go to press with this report of the Trust's activities in 2001, even greater changes are transpiring. In fact, this will be our final annual report to bear the name "Community Trust." As of July 1, 2002, we are known as the Community Foundation of Mount Vernon/Knox County, and Sam Barone has been appointed to serve as our first part-time executive director in residence. Soon we will also be unveiling a new logo for the Foundation.

Be assured the goals of the new Foundation are in complete harmony with those first articulated 57 years ago at the Community Trust's inception. As you will see in the pages of this report for the year 2001, the spirit of philanthropy flourishes in our community. And we are all the better for it.

Sincerely,



Mark R. Ramser  
Chairman



# trust

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## MISSION STATEMENT

The Mount Vernon/Knox County Community Trust, having been created to receive and accept property and contributions to be administered for charitable purposes benefiting Mount Vernon and Knox County, Ohio, shall be operated so as to fulfill the following mission:

### **Improving...**

the quality of life in Mount Vernon and Knox County through charitable giving;

### **Providing...**

a vehicle for donors with varied interests to support charitable and community activities;

### **Assessing...**

and responding to emerging and changing community needs in the fields of education, youth services, recreation, arts and culture, social services, and civic and community development; and

### **Developing...**

a permanent endowment for the community and serving as a catalyst to initiate vital projects.





A multi-year grant from the Trust assisted the Knox County Agricultural Society in its renovation of the Knox County Fairgrounds grandstand.



Children enjoy a variety of programs in the new multi-purpose building constructed by the Fredericktown Recreation Board with Community Trust funding.

The Mount Vernon/Knox County Community Trust completed another outstanding year in 2001. Over \$730,000 was distributed to numerous organizations, which is the second highest annual amount in the history of the Trust...



The Mount Vernon/Knox County Community Trust completed another outstanding year in 2001. Over \$730,000 was distributed to numerous organizations, which is the second highest annual amount in the history of the trust. Designated giving, or charitable distributions made under instructions by the donors, increased to over \$355,000. This increase was the result of the outstanding additional contributions received in 2000, which generated income for distribution beginning in 2001. A directed gift of \$20,000 from Donald and Sigrid Harnsberger, to be given to support the Knox County Historical Society's work with Cooper Bessemer engines, also contributed to the increase.

Scholarships awarded to Knox County students exceeded \$165,000 and helped 166 students further their studies at the schools of their choices.

Grants from unrestricted funds exceeded \$190,000. The unrestricted funds of the Community Trust are those from which our Distribution Committee is able to allocate earned income to organizations and projects which address significant Knox County needs and funding opportunities. A wide range of projects received support from the Trust in 2001. Gifts of \$10,000 or more were made to help make the Wellness Center in Centerburg a reality, to repair and improve the New Directions structure, to automate the libraries at the elementary schools in Mount Vernon, and to provide new playground equipment at Dan Emmett Elementary School. Continuing gifts enabled the renovation of the Knox County Fairgrounds grandstand and the final surfacing of the Mohican Valley Trail in the eastern part of the county. Grant installments were also made to the music complex at Kenyon College and YMCA for updated exercise equipment.

The book value of the Community Trust increased approximately \$1,400,000. A substantial gift was received from J.R. Purdy's trust near year-end, totaling more than \$780,000. This scholarship fund will be developed to support both nursing scholarships and, as a new venture for the Community Trust, to support individuals embarking on a second or third career. Mr. Purdy's foresight in making this gift with these parameters shows how he was continually looking ahead for new needs rather than trying to

fund the status quo. Norma Cornell's estate distributed \$50,000 to the Trust in December to begin two new scholarships for Knox County residents, with additional funding occurring in 2002. Another new scholarship program was begun with the Kathryn Ann Levering Memorial Scholarship Fund, which was created from many individual donations, as can be seen from the listing of contributors later in this report. Additional funding was received for the Donald and Sigrid Harnsberger Scholarship fund, the Ohio Junior Miss Fund, the "Rollin' Buckeye" fund sponsored by Dean and Audrey Spearman, the Jay and Sarah Wilson OSU Scholarship Fund and for several Zelkowitz family scholarship funds augmented during the year by Helen Zelkowitz.

New designated funds were created by the William Howard McDonald estate for the benefit of the Friends of Quaker Cemetery near Fredericktown, and an additional gift was received from J.R. Purdy for the United Methodist Church of Danville. Additional funding for existing funds was received from Ted and Ann Schnormeier and from Ariel Corporation for the Stacy Doyle fund. A full listing of the 177 funds of the Mount Vernon/Knox County Community Trust is contained in the pages which follow.

Considerable time and energy were expended during 2001 to prepare for the conversion of the Community Trust to the Community Foundation of Mount Vernon/Knox County. This conversion occurred in 2002 allowing the Foundation more flexibility in meeting the ever-changing needs of the area in which we live. The size of the Distribution Committee was expanded during the year to begin the changes necessary to strengthen the process of grant-making and development. More information on these areas will be announced during 2002.

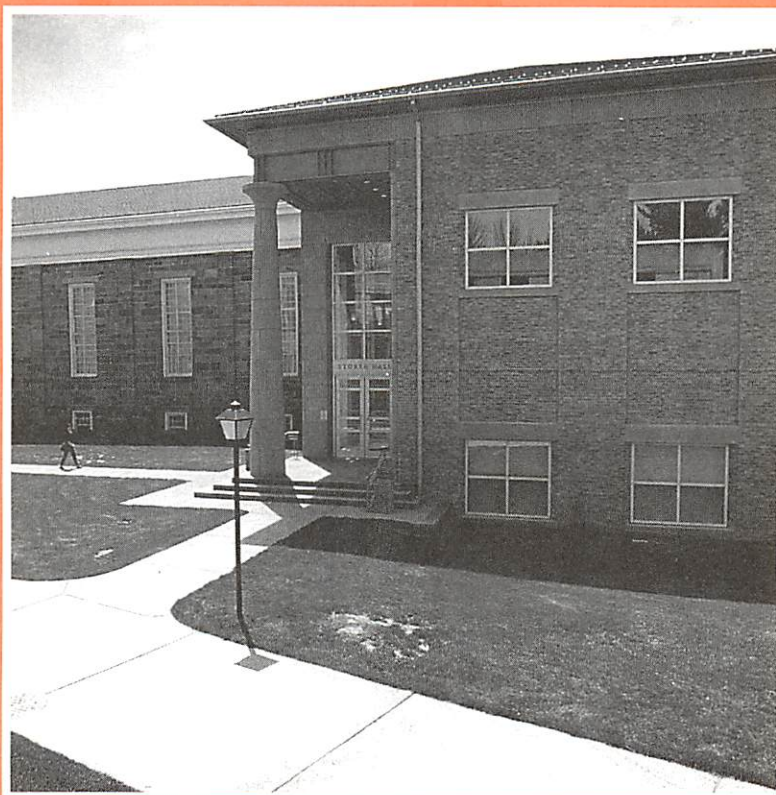
One of the major reasons for publishing an annual report of the Trust is to allow the good works of its contributors to shine as a beacon guiding and inviting new donors to join their ranks. Funds of the trust are living memorials to their grantors. They keep on giving year after year.

It is easy to start a fund in the Community Trust. Just ask us how. We can help you to tailor it to your preferences, plans and aspirations.

## Contributors to the Trust in 2001

Ariel Corporation  
Mr. & Mrs. James Buchwald  
Ms. Norma J. Cornell Estate  
Mrs. Joan Dailey  
Dan Emmett Music & Arts Festival Inc.  
Dr. Jack D. Tidyman  
The Wilbur F. Gaunder Living Trust  
Mr. & Mrs Edward Hall  
Mr. & Mrs. Donald Harnsberger  
Mr. & Mrs. Robert Harnsberger  
Mr. & Mrs. Irwin Jennings  
Dr. & Mrs. Emerson Laird  
Mr. Russell Leedy  
Ms. Ruth E. Leedy  
Mr. & Mrs. Thomas Lockard  
Madcap Memorial Fund  
William Howard McDonald Estate  
John & Genevieve Minor Foundation  
The Honorable William Mosholder  
Mulberry Street United Methodist Church  
Mr. & Mrs. Jeffrey Mullin  
Mr. & Mrs. Jerry Navin  
North-Dilley Funeral Home - John & Mary Dilley  
Ohio Junior Miss  
Mrs. Daniel Pealer  
The J.R. Purdy Trust  
Mr. & Mrs. John Rentz  
Mrs. Margaret Riley  
Mr. & Mrs. Theodore H. Schnormeier  
Mr. & Mrs. Dean Spearman





Community Trust grants contributed to building Storer Hall, home of the Music Department, at Kenyon College (photo by John Seavolt).

Unrestricted funds are the most responsive to changing needs in the community. These funds permit the Trust to meet urgent community needs through a high degree of flexibility. Income is distributed for local purposes and projects where the needs are the greatest as determined by the Distribution Committee.



# GRANTS+SCHOLARSHIPS • \$732,571

## GRANTS FROM UNRESTRICTED FUNDS

American Red Cross	\$ 5,000
A grant for structural, functional and aesthetic improvements to its county headquarters.	
Centerburg Local Schools	15,000
A grant toward the construction of a Wellness Center.	
Danville Local Schools	4,500
A grant for lighting equipment.	
Food for the Hungry	10,000
Grants for 2000 and 2001 support.	
Fredericktown Recreation District	2,000
A grant for the construction of a shelter/maintenance building.	
Habitat for Humanity	9,000
A grant to purchase a trailer for equipment moving and storage.	
Junior Achievement	2,000
A grant to expand educational programming to additional Knox County schools.	
Kenyon College	40,000
The fourth installment of a grant toward the revitalization of the music complex.	
Knox County Agricultural Society	25,000
The final installment of a grant to renovate the Knox County Fairgrounds grandstand.	
Knox County Educational Service Center	3,500
For the eighth consecutive year, the Trust has underwritten the Youth Enrichment Series (YES), bringing cultural programs to all Knox County Schools.	
Kokosing Early Children Center	3,000
A grant to initiate phase one of a community assessment project.	
Mohican Valley Trail	16,000
The final installment of funding for surfacing costs on the Trail.	
Mount Vernon City Schools	10,000
The first installment of a grant to automate the elementary school libraries.	
Mount Vernon City Schools	10,000
A grant for new playground equipment for Dan Emmett Elementary School.	
Mount Vernon City Schools	901
A grant for the creation of a WILD School Site at Pleasant Street Elementary School.	
Mount Vernon City Schools	2,429
A grant for new playground equipment for Wiggin Street Elementary School.	
Mount Vernon/Knox County Chamber of Commerce	1,600
A grant for scholarships to the Leadership Knox Program.	
New Directions	10,267
A grant for repairs and improvements to its facility.	
The Sanctuary	3,675
The final payment of a matching grant for building renovations for The Sanctuary in Danville.	
Sons of Union Veterans	3,000
A grant to repair and restore the Gettysburg monument honoring Knox County soldiers.	
Station Break	5,100
A grant to purchase a new gas range for meal services.	
YMCA of Mount Vernon	10,000
The third payment of a matching grant for exercise equipment.	

**Total Grants From Unrestricted Funds**

**\$191,972**

## ● Contributors to the Trust in 2001

State Farm Insurance -  
Richie Bastin

Mr. & Mrs. Kenneth Stevenson

Dr. & Mrs. Perry M. Trinkner

Mrs. Bonita B. Warren

Mr. & Mrs. Jay Wilson

Mr. & Mrs. Lawrence Yamamoto

Mrs. Helen E. Zelkowitz

## ● Memorial Fund

Psi Iota Xi Sorority

## ● William and Helen Pond Scholarship Fund

Mrs. Deborah P. Hoyt

Mr. & Mrs. Bruce Sutherland

Ms. Madeleine Szymask

## ● Charles Pursel Scholarship Fund

Mr. & Mrs. Harold Bechtel

Mr. Thomas Boyd

Mr. Michael Darks

Mr. & Mrs. Charles Elliott

Mr. & Mrs. Blake M. Fritz

Mr. & Mrs. William Hanna

Mr. & Mrs. Jeffrey Lavey

Mr. & Mrs. Gene Lowe

Mr. & Mrs. Encil Mills

Mrs. Charles Pursel

Mr. & Mrs. Stephen Schlosser

Mr. & Mrs. Garrett Swendal

## ● Kathryn Ann Levering Memorial Scholarship Fund

Donald E. & Kris A. Almendinger

Ronald Q. & Janice G. Alexander





New computers help to automate the libraries in Mount Vernon's Elementary Schools.



"Pairie Orchid" was one of the featured performers in the 2001 - 2002 Youth Enrichment Series (Y.E.S.) for Knox County students.

Designated distributions are made according to written instructions at the time the gift is made. Grants from Designated funds reflect the charitable interests of donors and provide needed operating support to diverse charitable organizations. These funds represent a permanent memorial to the donor.



# GRANTS+SCHOLARSHIPS

## GRANTS FROM DESIGNATED FUNDS

Altrusa Fund	
Knox County Career Center	\$ 186
Mount Vernon City Schools	186
Public Library of Mount Vernon and Knox County	186
Fred Barry Jr. Scholarship Fund	
Kenyon College	1,309
Mildred Bennett Fund	
East Knox Local School District	840
Knox County Career Center	841
Robert Black Fund	
Knox County Mental Health Association	4,178
J. Gordon Bone, Jr. Student Aid Fund	
Kenyon College	18,961
Mount Vernon Nazarene College	6,320
Sterling B. and Edna B. Braddock Fund	
Ebenezer United Methodist Church	409
Chalmers Library Fund	
Kenyon College Library	8,069
Garfield and Mazie Colgin Memorial Fund	
Messiah Church	3,257
Helen Hope Cooke Memorial Fund	
First Congregational United Church of Christ	21,380
Jennie Debes Heart Fund	
Knox County Heart Association	546
Stacy Doyle Memorial Fund	
Kokosing Gap Trail	522
First Congregational United Church of Christ Fund	
First Congregational United Church of Christ	122
First Congregational United Church of Christ - Building Fund	
First Congregational United Church of Christ	87
First Congregational United Church of Christ - Howard Tarr Fund	
First Congregational United Church of Christ	102
First Congregational United Church of Christ - Walter Starr Fund	
First Congregational United Church of Christ	100
Friends Cemetery Fund	
Friends Cemetery	73
Wilbur Gaunder Fund for Harcourt Parish Episcopal Church	
Harcourt Parish Episcopal Church	3,525
Wilbur Gaunder Fund for Hospice of Knox County	
Hospice of Knox County	3,525
Wilbur Gaunder Fund for Knox County Humane Society	
Knox County Humane Society	3,361
Wilbur Gaunder Fund for Knox County Red Cross	
Knox County Red Cross	3,525
Wilbur Gaunder Fund for the Salvation Army	
Salvation Army	3,361
Gelsanliter Family Fund	
Kenyon College	231
George and Ruth Gelsanliter Memorial Fund	
Interchurch Social Services	373
Hospice of Knox County	373
Donald and Sigrid Harnsberger Fund	
Knox County Historical Society	20,000

## ● Kathryn Ann Levering Memorial Scholarship Fund

Aristocrat Senior

Management, LTD

Richard J. & Judy A. Ashcraft

Neel & Barbara Awwiller

James S. & Lisa B. Bakos

Virgil & Maxine Barber

Gregory W. & Deirdre L. Barnes

Kathy Blackburn

Jeffrey L. & Deborah A. Booth

Jacquelyn A. Boyd

James F. & Lisa A. Boyd

L. Thomas & Darcy Boyd

James & Susan Braddock

Dale & Mary Braddock

Ray & Jaci Brewer

Raul A. & Terri L. Briones

Kelly E. & Marcia A. Brown

Robert J. & Mary M. Brown

Stan & Michele S. Brown

David A. & Theresa A. Brown

Robert J. & Carol L. Buckman

Gregory L. & Denise K. Burgess

Timothy D. & Roberta Burkam

William J. & Karma J. Burke

Robert E. & Lynn A. Burns

Hall & Angela Canter, Jr.

Cantlon Associates, Inc.

Kimberly A. Cantwell

Clifford A. & Amy L. Carpenter

Neal E. & Sheryl L. Clark

Andrew R. & Colleen B. Clarkson

Stephen G. & Marsha L. Cochran

Michael L. & Theresa A. Cockrell

Bonnie F. Corba

Ruth A. Cordle

A. Lisa Craft



## GRANTS FROM DESIGNATED FUNDS *continued*

Ellen Heckler Memorial Fund	
Ohio Eastern Star Home	125
H. Grant Heckler Memorial Fund	
Gay Street United Methodist Church	193
W. Glenn Hess Fund	
American Red Cross	1,731
Bladensburg Church of Christ	1,731
Brinkhaven Church of Christ	1,731
Danville Church of Christ	1,731
Martinsburg Church of Christ	1,731
Salvation Army	1,731
United Way of Knox County	1,731
Utica Church of Christ	1,731
Zack T. Hollister Fund for Bird Cemetery	
Bird Cemetery Association	75
Interchurch Social Services Fund	
Interchurch Social Services	2,768
Alice Jewell Memorial Fund	
Heart of Ohio Girl Scouts	33
F. William Kahrl Fund	
St. Paul's Episcopal Church	123
R. B. Kincaid Fund for the First Congregational United Church of Christ	
First Congregational United Church of Christ	1,343
Kiracofe Family Fund	
First Congregational United Church of Christ	385
Knox County Cancer Society Fund	
Knox County Cancer Society	74
Knox County Heart Fund	
Knox County Heart Association	74
Knox County Historical Society Fund	
Knox County Historical Society	470
Knox County Humane Society-Barbara S. Jones Fund	
Knox County Humane Society	12,149
Kokosing Gap Trail Fund	
Kokosing Gap Trail	34
Emerson Laird Kokosing Gap Trail Maintenance Fund	
Kokosing Gap Trail	177
Harriett B. Lawler Fund	
Gay Street United Methodist Church	4,813
Muskingum College	3,209
League of Friendship Fund	
Knox County Historical Society	94
Ethel H. Lyman Memorial Fund	
Public Library of Mount Vernon and Knox County	209
James K. Lyman Memorial Fund	
American Red Cross - Knox County Chapter	10
Daniel Memorial Pealer Fund	
Mulberry United Methodist Church	48
Dr. Clyde L. and Dora L. Purdy Fund	
Gay Street United Methodist Church	558
Arthur and Grace Rawlinson Memorial Fund	
St. Paul's Episcopal Church	774
Walter and Jane Rudin Family Fund	
City of Mount Vernon	3,259
St. Paul's Episcopal Church Fund	
St. Paul's Episcopal Church	39



Delbert C. Schmidt Fund	
Faith Lutheran Church	195
Schnormeier Family Fund	
First Congregational United Church of Christ	4,000
Hospice of Knox County	1,500
Interchurch Social Services	1,500
Knox County Symphony	500
Kokosing Gap Trail	1,000
Mount Vernon Nazarene College - Schnormeier Family Fund Scholarship	2,000
New Directions	1,500
Salvation Army	1,500
United Way of Knox County	5,000
University of Iowa Foundation	200
YMCA	800
Zenno and Mae Taylor Fund for First Congregational United Church of Christ	
First Congregational United Church of Christ	1,429
Mae S. Taylor YMCA Fund	
YMCA of Mount Vernon	3,759
Martha Turner Walker Memorial Fund	
First Presbyterian Church	39
C. Watkins Family Fund	
Knox County Symphony	200
Hospice of Knox County	200
Mount Vernon Nazarene College	200
United Way of Knox County	1,200
James Robert Westerheide Memorial Fund	
St. Vincent de Paul School	79
Amy F. Williams Memorial Fund	
First Congregational United Church of Christ	4,577
Salvation Army	6,293
YMCA of Mount Vernon	16,582
Beatty B. Williams Community Endowment Fund	
YMCA of Mount Vernon	31,556
Beatty B. Williams Library Fund	
Mount Vernon Public Library	2,451
Beatty B. Williams for YMCA et. al.	
First Congregational United Church of Christ	6,662
YMCA of Mount Vernon	6,662
National Board of YMCA	6,662
United Way of Knox County	6,662
YMCA Endowment Fund	
YMCA of Mount Vernon	85,723
YWCA Council Scholarship for Girls Fund	
YMCA of Mount Vernon	657
Helen E. Zelkowitz Fund	
Kenyon College - Brown Environmental Center	1,000
Knox County Historical Society	1,000
Mount Vernon Nazarene College - Christmas Classic Award	1,000
New Directions	250
Psi Iota Xi - Arts & Literature Scholarship	250
Salvation Army - Summer Camp Program	250
Soroptomists of Mount Vernon - Women Helping Women	500

### Total Designated Grants

**\$356,370**

### Total Donor-Advised Grants

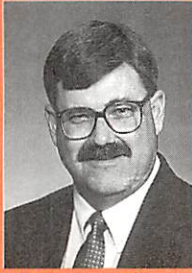
**\$19,000**

### ● Kathryn Ann Levering Memorial Scholarship Fund

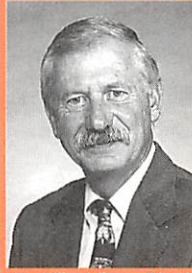
Paul G. & Ellen G. Crawford  
Tom D. & Mandy A. Craze  
Edward E. & Jonette Curry  
Donald & Debbie Hawk  
Ralph E. & Pauline E. Daily  
L. A. Dalrymple  
John S. & Lisa K. Dilts  
Doris J. Dilts  
Michael L. & Kelly Kemp Dodd  
Harvey D. & Kathryn M. Doremus  
John W. & D. Gayle Dowalter  
Arthur K. & Beverly Jo Dremann  
Druzak Medical, Inc.  
Harvey S. & Sheila Dulin  
Dumbaugh Insurance  
Agency, Inc.  
W.L. & Connie Dunn  
Mr. & Mrs. Norman C. Emmetts  
England & Associates  
Dale S. & Byrdella M. Evans  
Bernadine M. Falcone  
Donald L. & Julia R. Falk  
Marjorie A. Fearn  
M. Martin & Theresa M. Fernandes  
First Baptist Church  
First-Knox National Bank  
David J. & Elizabeth C. Firth  
Joseph A. & Ramona K. Fleming  
John W. & Donna J. Foisel  
William A. & Rose Mary Fortuna  
Fredericktown Church  
of the Nazarene  
Beatrice Ganellin  
Ken G. & Patti S. Goeppinger  
Robert S. & Carole Jo Gregg  
Timothy A. & Beth A. Grogg



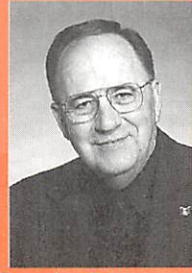
## 2001 Distribution Committee



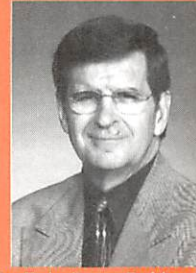
Mark R. Ramser, Chairman  
*Appointed by Directors of  
First-Knox National Bank*



John D. Ellis, Vice-Chairman  
*Appointed by the City Council  
of Mount Vernon*



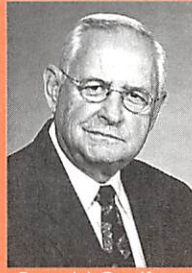
Douglas Brenneman  
*Appointed by the  
Distribution Committee*



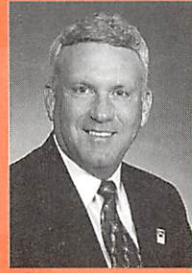
Dr. E. Lebron Fairbanks  
*Appointed by the  
Distribution Committee*



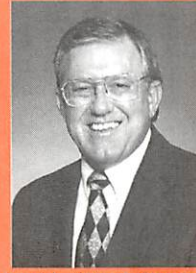
Thomas R. Fosnaught  
*Appointed by the  
Distribution Committee*



Ronald Godfrey  
*Appointed by the  
Distribution Committee*



Dennis L. Snyder  
*Appointed by  
National City Bank*



Robert L. Rauzi, Secretary  
*Appointed by the  
Distribution Committee*



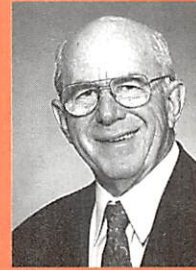
Sally Nelson, Treasurer  
*Appointed by the  
Distribution Committee*



Dr. Deborah Reeder  
*Appointed by the  
Distribution Committee*



Joan Jones  
*Appointed by the Directors of the  
Mount Vernon/Knox County  
Chamber of Commerce*



L. Bruce Levering  
*Appointed by the joint action of  
Knox County Judge of the Court of  
Common Pleas and the Judge of the  
Probate Court*

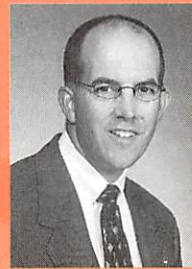
## OTHERS WHO HAVE SERVED ON THE DISTRIBUTION COMMITTEE

J. Gordon Bone  
Maureen Buchwald  
Clyde G. Conley  
Winslow Curry  
Dr. John C. Drake  
Dale E. Foster  
J. Abbott Herron  
Stanley E. Johnson, Jr.  
C. R. Jones  
Frederick N. Lorey  
Bert W. Martin  
Thomas McDowell  
E. L. Miller

J. Robert Purdy  
John W. Rudin  
John W. Rudin, Jr.  
Dr. Richard L. Smythe  
O.W. Stanley  
Donald E. Steele  
Kenneth W. Stevenson  
William A. Stroud  
Beatty B. Williams  
Helen E. Zelkowitz

## TRUSTEE

The First-Knox National Bank Mount Vernon, Ohio



David L. Trautman  
*President and Chief  
Executive Officer*



Ian Watson  
*Vice President  
and Trust Officer*

## PAST SECRETARIES

Fred Barry, Jr.  
James J. Cullers  
Charles M. Zelkowitz

Distribution Committee Members & Secretary serve without compensation.



## GRANTS+SCHOLARSHIPS

### 2001 SCHOLARSHIP GRANTS

Grants for scholarships are made from three categories of funds: Unrestricted, Designated, and Donor-Advised. The Trust has appointed an independent Scholarship Selection Committee to evaluate and select candidates for scholarship awards. The Selection Committee is composed of three members, one each from Kenyon College, the Mount Vernon Nazarene College, and a high school in Knox County. The Trust distributed 166 grants during the past year.

#### **Robert C. Appleton Fund**

Mount Vernon Nazarene College  
Mount Vernon Nazarene College  
Olivet Nazarene College  
University of Michigan  
Xavier University

#### **Recipients**

Cathy A. Auker 1,000  
Nickolas L. Miller 1,000  
Julie M. Arnold 1,000  
Shu-Fu Chen 1,000  
Jason T. Butcher 1,000

**\$5,000**

#### **Clark and Lucy Biggs Fund**

Amherst College  
Baldwin-Wallace College  
Bluffton College  
Brigham Young University  
DePauw University  
Hope College  
Kenyon College  
The Ohio State University  
Ohio Wesleyan University  
Point Loma Nazarene

Katharine F. Baker 1,000  
Kimberly N. Metcalfe 1,000  
Bradley R. Moore 1,000  
Emily B. Scoresby 1,000  
Matthew L. Behrensmyer 1,000  
Joshua A. Brandenburg 1,000  
Eric D. Koppert 1,000  
Aaron P. Stockberger 1,000  
Julia E. Geiger 1,000  
Brent M. Hall 1,000

**\$10,000**

#### **Helen H. Cooke Fund**

Ashland University  
Bowling Green State University  
Case Western Reserve  
Cornell University  
DeVry Institute of Technology  
Indiana Wesleyan University  
Kent State University

Vincent D. Swartzentruber 1,000  
Eric A. Kintner 1,000  
Kerry D. Auten 1,000  
Karl W. Brown 1,000  
John E. Robinson 1,000  
Rebecca A. Wagner 1,000  
Chadwick E. Barnes 1,000

**\$26,500**

#### ● **Kathryn Ann Levering Memorial Scholarship Fund**

Peter & Mary Jane Hallahan  
Joseph W. & Paulette J. Harbert  
Hathaway Farms  
Bruce E. & Lenore C. Hawkins  
Health Care Facilities  
Pauline Heller  
Thomas C. & Margaret A. Henderson  
Judith A. Ertter & Rohn S. Hess  
Deborah K. Hite  
Edward C. & Christine E. Hohman  
T. Frederick & Janet H. Holden  
Shawn T. & Lindalou Holian  
Clarissa A. Howard  
Howard, Wershbaile & Co.  
Jim & Jean Hubbard  
Eugene H. & Gloria Huber  
Gordon R. & Sheila Huff  
Dan E. & Barbara E. Humphrey  
Charles W. & Peggy A. Hunt  
Joseph A. Ianetta  
Josephine E. Ianetta  
Clyde E. & Jean A. Jacobs  
Marcia Jacobs  
Jacqueline K. Johnson  
Robert L. & Lisa H. Johnson  
Ronald L. & Elaine M. Johnson  
Kenneth A. & Carolyn F. Johnson  
R. Lee & Frances K. Johnson  
Kenneth G. & Joyce Kemp  
Charles J. & Carol R. Kilkenny  
William H. & Bonnie Kinschner  
Richard A. & Marilyn J. Klapproth  
Sean W. & Deborah A. Klemencic  
Knox Community Hospital



**Helen H. Cooke Fund** *continued*

Marietta College  
 Miami University  
 Miami University  
 Mount Vernon Nazarene College  
 The Ohio State University  
 The Ohio State University  
 The Ohio State University  
 The Ohio State University  
 The Ohio State University  
 The Ohio State University  
 Otterbein College  
 University of Akron  
 University of Cincinnati  
 University of Cincinnati  
 University of Dayton  
 University of Rochester  
 University of Toledo  
 University of Toledo  
 University of Toledo

**Recipients****\$26,500**

Amanda A. Harris 1,000  
 Courtney L. Curry 1,000  
 Mindi S. Overholt 1,000  
 Laura B. Burgholder 1,000  
 Seth M. Andrzejewski 1,000  
 Sarah E. Boone 1,000  
 Garrett A. Bunnell 1,000  
 Jennifer L. Doane 1,000  
 Carrie E. Levering 1,000  
 Candace R. Lifer 1,000  
 Joshua T. Grimm 1,000  
 Cynthia A. Troyer 1,000  
 Craig R. Casey 1,000  
 Kristy A. Frank 1,500  
 Christopher Braddock 1,000  
 Angela M. Yarnell 1,000  
 Jonathan P. Blevins 1,000  
 Amanda J. Cochran 1,000  
 Sarah J. Neighbarger 1,000

**Harold B. Cunningham Fund**

Ohio University

Joshua J. Conkle

**\$500**

500

**Ralph and Ara Flack Fund**

North Central Technical College

Mark A. Fausnight

**\$1,000**

1,000

**Pauline B. Freeman Fund**

Ashland University  
 Ashland University  
 Ashland University  
 Baldwin-Wallace College  
 Central Ohio Technical College  
 Coastal Carolina University  
 College of Wooster  
 Denison University  
 Denison University  
 Grove City College  
 Hiram College  
 Huntington College  
 Indiana Wesleyan University  
 Kenyon College  
 Kenyon College  
 Malone College  
 Marietta College  
 Miami University  
 Mount Vernon Nazarene College  
 Mount Vernon Nazarene College  
 Mount Vernon Nazarene College  
 North Central State College  
 The Ohio State University  
 The Ohio State University  
 The Ohio State University - Mansfield Branch  
 The Ohio State University - Newark Branch  
 The Ohio State University - Newark Branch  
 Ohio University  
 Otterbein College  
 Otterbein College  
 Taylor University

Jennifer A. Billow 1,000  
 Courtney D. Hardesty 1,000  
 Shannon L. Lampley 1,000  
 Gabriel P. Swarts 1,000  
 Monica A. Rice 1,000  
 Brian K. Thatcher 1,000  
 Ben M. Swarts 1,000  
 Melanie J. Houston 1,000  
 John J. Wells 500  
 Rebecca J. Betts 1,000  
 Monica L. Durbin 1,000  
 Andrea L. Webb 1,000  
 Bethany J. Lamb 1,000  
 Derick M. Busenburg 1,000  
 Adam A. Sapp 500  
 Rebecca A. Workman 750  
 Angela M. Hardesty 1,000  
 Gail M. Kleinrichert 500  
 Jessica M. Grennell 1,000  
 Kristin R. Payne 1,000  
 Monica D. Van Scyoc 1,000  
 Rochelle Durbin 1,000  
 Lesley A. Landis 1,000  
 Kari A. Parker 1,000  
 Stacy L. Smith 750  
 Jamie L. Forster 1,000  
 Krista M. Pappas 1,000  
 Liesel H. Ramsey 1,000  
 Stacy L. Campbell 1,000  
 Suzanne K. Campbell 1,000  
 Lindsay M. Clouston 1,000

**\$32,500**



**Pauline B. Freeman Fund** *continued*

University of Rio Grande  
 Wright State University  
 Walsh University  
 Youngstown State University

**Recipients**

Sarah E. Hanna 500  
 Stephanie N. Olson 1,000  
 Marie B. Bratton 1,000  
 Rebecca L. Payne 1,000

**\$32,500****Lillian Hickman Medical Scholarship Fund**

Case Western Reserve University  
 Dartmouth Medical School  
 Philadelphia College of Medicine  
 Wright State University

Chad J. Jessup 5,000  
 Bryan N. Coffing 5,000  
 Michael J. Edgehouse 5,000  
 Casey R. Braddock 5,000

**\$20,000****Charles and Zella Horn-Simpson Fund**

Denison University  
 Denison University

Carol N. Collins 500  
 John J. Wells 500

**\$1,000****William S. Hunter Fund**

Mount Vernon Nazarene College

Hannah R. Rodden 500

**\$500****Rex M., Jr. and Barbara C. Lamb Fund**

College of Wooster  
 Kent State University  
 University of Cincinnati

Sebastian A. Coleman 1,000  
 Guinevere C. Schlegel 1,000  
 Riley B. Zollars 1,000

**\$3,000****Harriet B. Lawler Fund**

Drake University  
 Emory University  
 Ohio University  
 Wilmington College

Drew C. McCoy 1,000  
 Adam J.T. Smith 1,000  
 Joshua J. Conkle 1,000  
 Bradley E. Kohl 1,000

**\$4,000****Leedy Family Fund**

Indiana Wesleyan University  
 Ohio State University - Mansfield Branch  
 Otterbein College

Miriam E. Wagner 1,000  
 Michelle D. Gregg 1,000  
 Kelly L. Foster 1,000

**\$3,000****Frederick N. Lorey Journalism Scholarships**

Brigham Young University  
 Centenary College of Louisiana  
 Ohio University

Jennifer Hansen 1,000  
 Timothy W. Vance 1,000  
 Erin H. Buckalew 1,000

**\$3,000****Ralph V. and Anna B. Mowery Fund**

Taylor University Fort Wayne

Corey S. Alton 1,000

**\$1,000****Nursing Scholarships**

Central Ohio Technical College  
 Central Ohio Technical College  
 Knox County Career Center  
 Knox County Career Center  
 Knox County Career Center  
 Knox County Career Center  
 Knox County Career Center  
 Knox County Career Center  
 Knox County Career Center  
 North Central State College  
 North Central State College  
 North Central State College  
 North Central State College

Brooke R. Sapp 1,000  
 Melissa A. Schooley 1,000  
 Rosanna D. Blamer 500  
 Heather L. Glasmeier 500  
 Martha M. Grennel 500  
 Anita L. Hauger 500  
 Tabitha C. Judson 500  
 Alizabeth A. Lepley 500  
 Amanda N. Lepley 500  
 Kimberly S. Bolton 1,000  
 Karen S. Loney 1,000  
 Amy J. Perkins 1,000  
 Davida R. Scott 1,000

**\$9,500**

● **Kathryn Ann  
 Levering Memorial  
 Scholarship Fund**

William F. & Eleanor D. Koenig

William & Fran Koenig

Glenn M. & Patricia M. Korenko

Constance M. Korthals

Noreen T. Koval

Louis S. & Sara Kreider

Danielle M. Kretch

Kevin F. & Laurie A. Kuhar

Daniel & Suzanne M. Kukura

David A. & Susan Kulikowski

Jeff A. & Tamara L. Lafever

James C. & Linda M. Lawson

Robert & Kathy Levering

William B. & Mary Jo Levering

James A. & Jean D. Levering

Usher L. Levering

David L. Lockard

Charles L. & Jessie L. Loechler, Jr.

David A. & Joan M. Logan

Glen H. & Tonja L. Long

Michael A. & Carla D. Longano

Armida P. Magri

James R. & Celeste S. Magri

Rick & Mary Kay Magri

John F. & Jacqueline M. Maiher

Robert M. & Michelle M. Maljarik

Lynn E. & Sean C. Malone

Vincent & Jean M. Mancisio

Ronda L. Martin

Scott & Shelli Mast

Patricia McKeegan

John S. & I. Sue McMillan

Jacqueline Lea Mercier

Robert D. & Bonnie Moore

Ray & Linda A. Morrison

Stephen L. & Paula A. Mould



<b><u>Richard Poling Fund</u></b>		<b><u>Recipients</u></b>	<b><u>\$3,000</u></b>
Hope College		John R. Rodstrom	2,000
Ohio Northern University		James L. Conner	1,000
<b><u>William E. and Helen F. Pond Fund</u></b>			<b><u>\$500</u></b>
Ohio University		Jennifer L. Johnston	500
<b><u>Dr. Clyde L. and Dora L. Purdy Fund</u></b>			<b><u>\$750</u></b>
The Ohio State University			
College of Veterinary Medicine		Carrie A. Boeshart	250
The Ohio State University			
College of Veterinary Medicine		Adam D. Parson	250
The Ohio State University			
College of Veterinary Medicine		Melissa S. Reddick	250
<b><u>Charles Pursel Fund</u></b>			<b><u>\$500</u></b>
Ohio University		Austin J. Nixon	500
<b><u>Rick L. Scott Memorial Fund</u></b>			<b><u>\$2,000</u></b>
Indiana Wesleyan University		Sarah E. Carter	1,000
Ohio University		Joshua J. Conkle	1,000
<b><u>Dean and Audrey Spearman "Rollin' Buckeye"</u></b>			
<b><u>Scholarship Fund</u></b>			<b><u>\$1,500</u></b>
The Ohio State University - Mansfield Branch		Alisha P. Grimm	1,500
<b><u>Strang Family Scholarship Fund</u></b>			<b><u>\$500</u></b>
Ohio University		Elaine K. Johnston	500
<b><u>Unrestricted General Fund</u></b>			<b><u>\$39,000</u></b>
Asbury College		Mark T. Carter	1,000
Bowling Green State University		Jennifer J. Burch	1,000
Bowling Green State University		Aaron R. Cook	1,000
Butler University		Daniel R. Landis	1,000
College of Wooster		Colleen M. Janczak	1,000
Grinnell College		Steven A. Fenigstein	1,000
Grove City College		Angela M. Metcalfe	1,000
Heidelberg College		Jodi L. Naylor	1,000
Hillsdale College		William A. Farnham	1,000
Houghton College		Michelle E. Mosher	1,000
Indiana Wesleyan University		Sarah E. Carter	1,000
Miami University		Peter C. Ferris	1,000
Miami University		Stacy L. Tiffany	1,000
Mount Vernon Nazarene College		Jessica R. Coe	1,000
Mount Vernon Nazarene College		Roger C. Shannon	1,000
New York University		Joshua R. Schonauer	1,000
Northeastern University		Heather L. Greer	1,000
Ohio Northern University		Scott E. Imboden	1,000
Ohio University		Austin J. Nixon	1,000
Ohio University		Bryna C. Ramsey	1,000
Ohio University		Maren L. Ramsey	1,000
The Ohio State University		Andrew N. Colopy	1,000
The Ohio State University		Brandi J. Dennis	1,000



### Unrestricted General Fund *continued*

The Ohio State University  
The Ohio State University  
The Ohio State University -  
Agricultural Technical Institute  
The Ohio State University - Mansfield Branch  
The Ohio State University - Mansfield Branch  
The Ohio State University - Newark Branch  
The Ohio State University - Newark Branch  
The Ohio State University - Newark Branch  
Point Loma Nazarene University  
Purdue University  
St. Olaf College  
St. Olaf College  
Smith College  
University of Dayton  
Wilmington College  
Wilmington College

### Recipients

Scott E. Imboden 1,000  
Sara L. Mosher 1,000  
  
Andre C. Ballard 1,000  
Tricia E. Kehl 1,000  
Brett W. Porter 1,000  
Cassandra L. Craig 1,000  
Darci E. Rine 1,000  
Colleen N. Shannon 1,000  
Hillary G. Proper 1,000  
Brian L. Balogh 1,000  
Amy R. Beavin 1,000  
Amy K. Bodart 1,000  
Elizabeth C. Laudeman 1,000  
Cheryl A. McLaughlin 1,000  
Jonathon M. Smith 1,000  
William C. Smith 1,000

\$39,000

### William E. Wing Fund

Heidelberg College

Jodi L. Naylor

\$500

500

### Helen E. and Charles M. Zellkowitz Fund

The Ohio State University -  
Agricultural Technical Institute

Andre Ballard

\$1,000

1,000

### Charles M. Zellkowitz Community Service Fund

Wilmington College

Annette L. Howell

\$1,000

1,000

### Stephen W. Zellkowitz Ethics Fund

Central Ohio Masters Commission

Adam S. Hoar

\$1,000

1,000

*Scholarships refunded in 2001*

\$6,521

### Total Scholarship Grants

\$165,229

Total Grants  
+ Scholarships

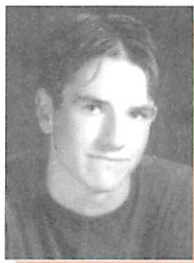
\$732,571



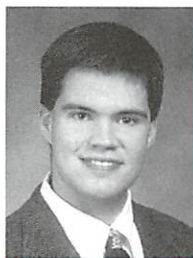
Chad J. Jessup  
*Lillian C. Hickman Medical  
Scholarship*



Casey R. Braddock  
*Lillian C. Hickman Medical  
Scholarship*



Michael Edgehouse  
*Lillian C. Hickman Medical  
Scholarship*



Bryan Neil Coffing  
*Lillian C. Hickman Medical  
Scholarship*

### ● Kathryn Ann Levering Memorial Scholarship Fund

Danny C. & Rita J. Mullins

L. Glenn and Joyce M. Newton

Miryoussef Norouzan

Virginia M. Norris

Donald & Michelle A. Novosel

Donald C. & Elizabeth A.

Pallandino

David J. & Shirley A. Pecjak

Pediatric Academic

Association, Inc.

Louis J. & Kimberly A. Peterlin

Louis A. & Linda Peterlin

Norman Peters

Neil & Mary G. Piek

Eric G. & Susan S. Popham

Staci L. Prine

Professional Speech Services, Inc.

Scott & Kathryn E. Pullins

John P. & Eileen J. Ranallo

Josephine M. Ranallo

Ronald R. & Jill S. Ranallo

Kenneth R. & Linda L. Ranallo

Paul & Janet Rendina

Dominick Rendina

Albert & Barbara Rendina

Mr. & Mrs. Michael Rendina

Dora M. Renicker

RH Positive, Inc.

K. Lee & Marjory Rhoades

Donald L. & J. Ridgeway

Timothy E. Rife

Paul E. & Joann Renicker Ringer

Michael & Sandra M. Rowe

Hal & Kimberly Rundell

William H. & Nancy Rupp

Marilyn S. Rutherford



The cornerstone of the Mount Vernon Community Trust is people... people who wish to make a difference. In 2001, the following new funds were established by people who care about the community and who have chosen the Trust to help make a difference. We acknowledge the vision of these generous donors and express our gratitude on behalf of our entire community.

## NEW FUNDS OF THE TRUST

<b><u>Norma J. Cornell Memorial Fund</u></b>	\$ 25,000
A bequest from the Norma J. Cornell estate	
<b><u>Norma J. Cornell Memorial St. Vincent DePaul Education Fund</u></b>	25,000
A bequest from the Norma J. Cornell estate	
<b><u>Danville United Methodist Church Fund</u></b>	86,788
A contribution from the J.R. Purdy Trust	
<b><u>Friends Cemetery Fund</u></b>	25,000
A bequest from the William Howard McDonald estate	
<b><u>Kathryn Ann Levering Memorial Scholarship Fund</u></b>	15,426
Memorial gifts given in Ms. Levering's name	
<b><u>Daniel Pealer Memorial Fund</u></b>	5,000
Memorial gifts given in Mr. Pealer's name	
<b><u>J.R. and Lorene Purdy Scholarship Fund</u></b>	781,092
A contribution from the J.R. Purdy Trust	
<b>Total New Funds</b>	<b>\$963,306</b>

## ADDITIONS TO EXISTING FUNDS

Fred Barry Jr. Scholarship Fund	\$ 200
Hannah Browning Home Fund	161
Stacy Doyle Memorial Fund	10,040
General Fund of the Trust	1,019
Donald and Sigrid Harnsberger Fund	20,000
Donald and Sigrid Harnsberger Scholarship Fund	14,640
Kokosing Gap Trail Fund	345
Emerson Laird Kokosing Gap Trail Fund	1,500
Leedy Family Fund	3,000
Memorial Fund	75
John and Genevieve Minor Fund	1,000
Ohio Junior Miss Scholarship Fund	24,529
William E. and Helen F. Pond Scholarship Fund	325
Charles Pursel Memorial Scholarship Fund	858
Schnormeier Family Fund	97,569
Rick L. Scott Memorial Scholarship Fund	1,000
Dean and Audrey Spearman "Rollin' Buckeye" Scholarship Fund	25,000
Perry and Louise Trinkner Fund	1,000
Jay M. and Sarah L. Wilson OSU Scholarship Fund	5,000
Helen E. Zerkowitz Fund	70,684

**Total Additions to Existing Funds** **\$277,944**

 Total Gifts

**\$1,241,251**



# FUNDS OF THE TRUST • \$20,415,197

The Mount Vernon/Knox County Community Trust is grateful for the many gifts received over the past 56 years. The grant-making of the Trust is made possible by the 177 individual funds listed below.

## UNRESTRICTED FUNDS

Ariel Corporation Fund	\$ 169,976
Thomas D. Badger Memorial Fund	1,171
Frank L. and Anna Beam Fund	14,941
Henry L. and Alice M. Beecher Fund	5,618
Luke B. Biggs Fund	140,135
Ralph L. and Doris Boyer Fund	144,591
Charles F. Colville Memorial Fund	1,493
James H. Debes Fund	149,283
Jennie J. Debes Fund	220,636
Mr. and Mrs. Frank L. Fairchild Fund	2,241
Harry and Lovella Foster Fund	107,237
General Fund of the Trust	2,083,803
Headington Family Memorial Fund	1,493
Dr. George and Lucile Imhoff Memorial Fund	1,688
Fred W. Kahrl Fund	1,493
Knox County Savings Bank Fund	5,976
Lamb Glass Company Fund	7,468
R.M. Lamb Fund	1,493
Lawrence and Josephine Lewis Fund	29,331
The Mount Vernon Bridge Company Fund	11,206
Ohio Magazine Fund	3,431
Nancy J. Page Fund	176,164
Havilah Phelps Fund	5,700
Margaret Polahar Memorial Fund	3,071
Pond Motors Sales Fund	597
J.R. and Lorene Purdy Memorial Fund	858,630
Residential Homes of Knox County Fund	21,306
Rudin Company Fund	14,941
J.W. Rudin Jr. Fund	1,493
J.W. Rudin Sr. Fund	3,242
W.M. Rudin Fund	1,493
Sanderson-Salisbury Memorial Fund	33,726
Berta H. Schnebly Fund	21,545
Belle Shrontz Fund	911,628
Annie Sommerville Fund	1,493
Mrs. Walter Sperry Family Fund	4,193
Blanche Stevenson Fund	14,429
Harry Strodtbeck Fund	1,493
Mary Blanche Stucky Fund	13,633
Fred A. Surlas Fund	2,241
Frederick and Carol Surlas Fund	5,348
Zenno E. and Mae S. Taylor Fund	482,499
Perry and Louise Trinkner Fund	11,657
Claude F. Turben Fund	1,493
Jean Ann Wagner Fund	77,600
Beatty B. Williams Memorial Fund	918,665
Edith H. Williams Memorial Fund	19,711
Lawrence F. and Ruby Williams Fund	279,177
Arthur C. and Ada B. Wolfe Memorial Fund	29,882
Jack Zeller Memorial Fund	1,191

**Total Unrestricted Funds**

**\$7,022,945**

## ● Kathryn Ann Levering Memorial Scholarship Fund

Joseph R. & Evelyn M. Sabino  
 Vincent R. & Monica J. Sakas  
 Sylvia T. Samsa  
 Guy R. & Kelly A. Saponaro  
 Floyd & Virginia Savage  
 David & Betsy Savage  
 Chester & Margaret Scarbrough  
 Joseph C. & Zo A. Sellers  
 Greg & Cheryl Sheldon  
 Wid & Lori Shipley  
 Linda L. & K. Dean Shira  
 L.A. Shultz  
 Gerald & Susan Simmons  
 George R. & Carol J. Simmons  
 Larry L. & Rosemary Smith  
 Sandra L. Smith  
 Peter F. & Christy J. Smith  
 Jack & Linda Snowbarger  
 Kathryn A. Snyder  
 Avanelle F. Spearman  
 T. Scott & Sandra L. Sprenger  
 Paul E. & Linda R. Spurgeon  
 Jackie Sternot  
 Livio & Catherine M. Stipcic  
 Timothy W. & Virginia J. Stone  
 John & Susan L. Stone  
 Craig M. & Kerri J. Stump  
 John F. & Marilyn Sulentic  
 Survey Solutions, Inc.  
 Earl & Josephine Swartzentruber  
 Robert W. & Dolores C. Talion  
 John J. & Angela C. Talion  
 Harold L. Tharp  
 Dale G. & Barbara P. Tier  
 Cathy Torrence  
 Mike & Patricia Tracey



### DESIGNATED FUNDS

Altrusa Fund	\$ 16,842
Fred Barry, Jr. Scholarship Fund	38,165
Mildred Bennett Fund	48,873
Robert Black Fund	121,454
J. Gordon Bone, Jr. Student Aid Fund	632,919
Sterling B. and Edna B. Braddock Fund	11,882
Hannah Browning Home Fund	749,720
Chalmers Library Fund	246,302
Character Building Activities Fund	3,472
Garfield and Mazie Colgin Memorial Fund	113,060
Helen Hope Cooke Memorial Fund	671,246
George T. Culbertson, Jr. Memorial Fund	9,041
Jennie Debes Heart Fund	35,153
Stacy Doyle Memorial Fund	23,013
First Congregational United Church of Christ Fund	3,546
First Congregational United Church of Christ Building Fund	2,519
First Congregational United Church of Christ - Howard Tarr Fund	2,956
First Congregational United Church of Christ - Walter Starr Fund	2,894
Friends Cemetery Fund	25,010
Wilbur Gaunder Fund for the Harcourt Parish Episcopal Church	108,385
Wilbur Gaunder Fund for the Knox County Red Cross	108,385
Wilbur Gaunder Fund for Hospice of Knox County	108,385
Wilbur Gaunder Fund for the Knox County Humane Society	103,173
Wilbur Gaunder Fund for the Salvation Army	103,173
Gelsanliter Family Fund	15,249
George and Ruth Gelsanliter Memorial Fund	21,709
Ellen Heckler Memorial Fund	3,643
H. Grant Heckler Fund	5,601
W. Glenn Hess Fund	451,680
Zack T. Hollister Fund for Bird Cemetery	2,182
Interchurch Social Services Fund	100,258
Alice Jewell Memorial Fund	945
F. William Kahrl Fund	3,574
R.B. Kincaid Fund for the First Congregational United Church of Christ	59,924
Kiracofe Family Fund	11,198
Knox County Cancer Fund	2,143
Knox County Heart Fund	2,143
Knox County Historical Society Fund	14,785
Knox County Humane Society - Barbara S. Jones Fund	343,507
Knox County Medical Society Scholarship Fund	1,457
Kokosing Gap Trail Fund	1,251
Emerson Laird Kokosing Gap Trail Maintenance Fund	6,342
Richard I. Landers for Knox County Career Center	2,656
Harriett B. Lawler Fund	273,746
League of Friendship Fund	2,727
Ethel H. Lyman Memorial Fund	6,086
James K. Lyman Memorial Fund	300
John and Genevieve Minor Fund	4,139
Mount Vernon Academic Boosters Fund	1,764
Mount Vernon High School Alumni Association Fund	1,380
Mount Vernon Livestock Co-Operative Fund	3,812
Mount Vernon Theater Guild Fund	480



Ohio Junior Miss Scholarship Fund	21,899
Daniel Pealer Memorial Fund	5,007
William Pond Fund	502
Dr. Clyde L. and Dora L. Purdy Fund	16,215
J.R. and Lorene Purdy Fund	86,788
Russell E. Ramser, Jr. Memorial Fund	14,083
Arthur and Grace Rawlinson Memorial Fund	28,360
Andy Rassing Fund	7,608
Walter and Jane Rudin Family Fund	100,721
St. Paul's Episcopal Church Fund	1,137
Delbert C. Schmidt Fund	5,675
Schnormeier Family Fund	397,701
William A. Stroud Fund	53,970
Symposiarchs Fund	1,019
Zenno and Mae Taylor Fund for First Congregational United Church of Christ	67,640
Mae Taylor Fund for the Mount Vernon YMCA	31,008
United Way of Knox County Fund	145,456
Martha Turner Walker Memorial Fund	1,127
William Kay Walker Memorial Fund	869
C. Watkins Family Fund	27,940
James Robert Westerheide Memorial Fund	2,308
Amy F. Williams Memorial Fund	304,041
Beatty B. Williams Community Endowment Fund	329,210
Beatty B. Williams Library Fund	103,481
Beatty B. Williams Fund for YMCA et. al.	399,559
Y.M.C.A. Endowment Fund	1,128,015
Y.W.C.A. Council Scholarship for Girls Fund	19,104
Helen E. Zelkowitz Fund	85,914

### Total Designated Funds

**\$8,020,606**

## MEMORIAL FUNDS

Herbert L. Belden  
 John L. Burgoon  
 Clyde G. Conley  
 Leona Culbertson  
 H. Grant Heckler  
 The departed friends of Mr. and Mrs. Howard Hollinger  
 John E. Mickley  
 John M. Miller  
 Jean Prosser  
 George Sasser  
 Paul E. Slaughter, Jr.

### Total Memorial Funds

**\$3,184**

## ● Kathryn Ann Levering Memorial Scholarship Fund

Kathleen E. Trego  
 Rocque & Sandra Trem  
 D.L. & Mary Tugend  
 Jeffrey L. & Lisa D. Turner  
 Twin Oaks Care Center  
 Ann Ullman  
 Robert M. & Patricia S. Undercuffler  
 Jean H. Updike  
 Peter E. & Karol Van Runkle  
 Timothy & Jamie L. Vanover  
 Robert S. & Sue A. Vaughn  
 Ted D. & Linn Wade  
 William Scott & Angela D. Walls  
 Robert D. & Patricia A. Weaver  
 Robert L. & Joyce A. Wehner  
 Carmon & Betty Weller  
 Jeffrey C. & Marjorie E. Weller  
 William & Fran Koening  
 Mildred B. Wolford  
 Timothy S. & Darlene K. Yake  
 YMCA  
 Craig A. Zack  
 Jeffrey G. & Margaret J. Zivkovic

## ● Other Contributors to the Trust

Altrusa Club  
 Lucy E. Beckley  
 W.R. Bouton  
 C. Monroe Bovard  
 James E. Brown  
 Edmund F. Budd  
 Clyde G. Conley  
 Lillian Conley  
 Ruth E. Conley  
 Cooper-Bessemer Corp.



### SCHOLARSHIP FUNDS

Arck/Crowthers Fund	\$ 4,214
Robert C. Appleton Scholarship Fund	125,179
Clark and Lucy Biggs Scholarship Fund	251,877
Charles E. Cassaday Scholarship Fund	3,889
Helen H. Cooke Scholarship Fund	683,194
Norma J. Cornell Memorial Fund	25,029
Norma J. Cornell Memorial St. Vincent de Paul Education Fund	25,029
Harold "Cookie" Cunningham Fund	10,763
Fredericktown Academic Loan Fund	7,637
Ralph and Ara Flack Scholarship Fund	25,197
Pauline B. Freeman Scholarship Fund	902,022
Wilbur Gaunder Engineering Scholarship Fund	1,209,348
Wilbur Gaunder Nursing Scholarship Fund	111,528
Larry Hall Scholarship Fund	2,653
Donald and Sigrid Harnsberger Scholarship Fund	39,421
Lillian C. Hickman Scholarship Fund	415,461
William S. Hunter Scholarship Fund	16,462
Ethel Jamison Scholarship Fund	7,157
Ida Kohl Scholarship Fund	6,285
Rex M., Jr. and Barbara C. Lamb Scholarship Fund	55,415
Harriett B. Lawler Scholarship Fund	85,444
Robert and Evelyn Lee Scholarship Fund	11,001
Leedy Family Fund	3,012
Alexandra Letz Scholarship Fund	26,648
Alexandra Letz Nursing Scholarship Fund	36,823
Kathryn Ann Levering Memorial Scholarship Fund	15,885
Ralph V. and Anna B. Mowery Scholarship Fund	52,456
Edna Osborn Scholarship Fund	1,251
Arthur J. Packard, Jr. Memorial Fund	20,666
Richard Poling Scholarship Fund	68,649
William E. and Helen F. Pond Scholarship Fund	11,744
J.R. and Lorene Purdy Scholarship Fund	781,996
Dr. Clyde L. and Dora L. Purdy Scholarship Fund	16,772
Charles Pursel Scholarship Fund	4,796
Rick L. Scott Memorial Scholarship Fund	48,247
Charles F. and Zella Horn Simpson Memorial Scholarship Fund	44,724
Richard and Regina Smythe Scholarship Fund	2,636
Dean and Audrey Spearman "Rollin' Buckeye" Scholarship Fund	51,950
Strang Family Scholarship Fund	23,328
Student Scholarship Fund	438
William and Jennie Johnson Scholarship Fund	318
Jay M. and Sarah L. Wilson OSU Scholarship Fund	15,432
William E. Wing Music Scholarship Fund	15,275
Charles M. Zerkowitz Community Service Scholarship Fund	33,744
Helen E. and Charles M. Zerkowitz Scholarship Fund	33,730
Stephen W. Zerkowitz Ethics Scholarship Fund	33,737

**Total Scholarship Funds**

**\$5,368,462**

**Total Funds  
of the Trust**

**\$20,415,197**



# The Community Trust offers several types of funds to meet the needs of donors...

## TYPES OF FUNDS

**Unrestricted funds** are the broadest option. An unrestricted fund permits our distribution committee to target resources, on your behalf, toward the community's most pressing needs and promising opportunities. By contributing to or establishing an unrestricted fund, a donor may create a living legacy that will keep pace with the community as new challenges emerge.

**Field of interest funds** allow donors to address a general area of need without being pressed to name specific charities. You decide the general purpose of the fund, such as meeting the needs of children, promoting the arts, providing senior services or pre-school options. The Trust will identify projects or organizations that most effectively and creatively address these needs.

**Donor-advised funds** are the Trust's most flexible funds. The donor-advised fund allows you to establish a named philanthropic fund while retaining the ability to recommend grants to specific organizations that you choose. Donors receive a full, up-front charitable deduction when the fund is created. The Trust ensures that all beneficiaries are legitimate charities, and provides advice and information about the community's needs and local charitable agencies. A donor-advised fund is a convenient way to simplify all your charitable giving. A donor-advised fund is an attractive alternative to setting up a private foundation because it offers maximum allowable tax benefits as well as low-cost administration and helpful grant-making services.

**Designated and Agency funds** are established by donors who may wish to specify a particular charitable agency or nonprofit organization to receive the proceeds of their fund. The agency benefits from the Trust's professional endowment management, freeing the agency's staff and board to concentrate on fulfilling its mission, purposes and running its programs for community benefit.

## ESTABLISHING A FUND

in the Community Trust.

- A fund may be established by an individual, a corporation or a nonprofit organization.
- A fund may be established by bequest or during one's lifetime.
- A fund may bear the name of the donor or loved one.
- Donors may specify whether principal and income or income alone may be used.
- Gifts to the Community Trust and its fund may be made in the form of cash, publicly-traded or closely-held securities, real estate, life insurance or personal property.
- Setting up a fund in the Trust requires execution of a simple governing document.
- Five thousand dollars or more will establish a new, named fund; or donors may take three to five years to reach the goal of a named fund.



Thousands of cyclists and walkers annually enjoy the scenic Kokosing gap Trail, a beneficiary of Community Trust grants.

## Other Contributors to the Trust

Cooper-Bessemer Employees'

Charities

Wilma Craine Memorials

Mrs. L. Tate Cromley

George T. Culbertson, Jr.

Cora D. Debes

George E. Deeley

Grover H. Detmer

Marjorie Dowds

Dr. John C. & Helen Drake

Kathryn Eastman

C. Floyd & Margaret Ellis

Jack V. Fearn

Mrs. Ara Flack

Dorothy Fletcher

Geraldine Fowler

Wilbur F. Gaunder

Hewitt A. Gehres

William A. Gower

Gregg Manufacturing Co.

Heaton Appliances

Icel Hensler

James & Mary Lou Imel

Information Control Corp.

Ralph M. Jewell

Christine Johnson

Stanley E. Johnson, Jr.

S.E. & Dorothy Johnson, Sr.

K. Allin & Evelyn Kahl

Mark C. Kinney

M. Curtis Kinney

T.O. Kuivinen

Arline Landers

Rhea H. Larson

Frederick N. & Genevieve Lorey

Bert W. Martin





**Dennis & Schisler, Inc.**  
Certified Public Accountants

206 South Mulberry Street, Mount Vernon, Ohio 43050  
Phone (740) 397-1721 Fax 397-7044

KENNETH E. DENNIS, CPA  
LARRY A. SCHISLER, CPA  
M. JACQUELINE STICHERT, CPA  
JANICE M. COMPTON, CPA

INDEPENDENT AUDITORS' REPORT

The Mount Vernon Community Trust  
Mount Vernon, Ohio 43050

We have audited the accompanying statement of investments of the Mount Vernon Community Trust as of December 31, 2001 and 2002 and the related statement of receipts and disbursements - cash basis for the years then ended. These financial statements are the responsibility of the Trust's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatements. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Mount Vernon Community Trust as of December 31, 2001 and 2000 and the receipts and disbursements of the Trust - cash basis for the years then ended in conformity with the cash basis of accounting, as described in Note A.

As described in Note A, the trust accrued certain contributions totaling \$1,000. If the contributions had not been recorded, the fund balance of the general fund would be decreased by \$1,000 for the year ended December 31, 2000.

*Dennis & Schisler, Inc.*

Mount Vernon, Ohio  
May 13, 2002

MEMBERS  
American Institute of Certified Public Accountants  
Ohio Society of Certified Public Accountants



# FINANCIAL STATEMENTS

Condensed Report of Condition as of December 31, 2001; taken from Report of Examination by Dennis & Schisler, Inc. CPA

Principal and Receipts

Beginning Balance (December 31, 2001)	\$ 19,074,125
Income	863,621
Realized Gains	236,389
Contributions	1,241,251
Beginning Balance Plus Receipts	<b>\$21,415,386</b>

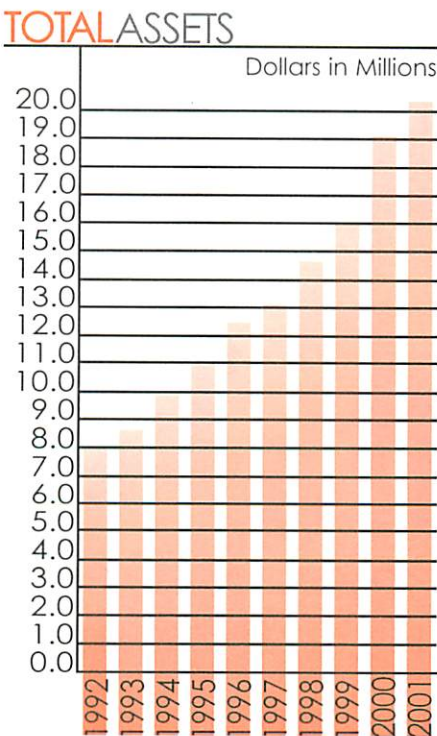
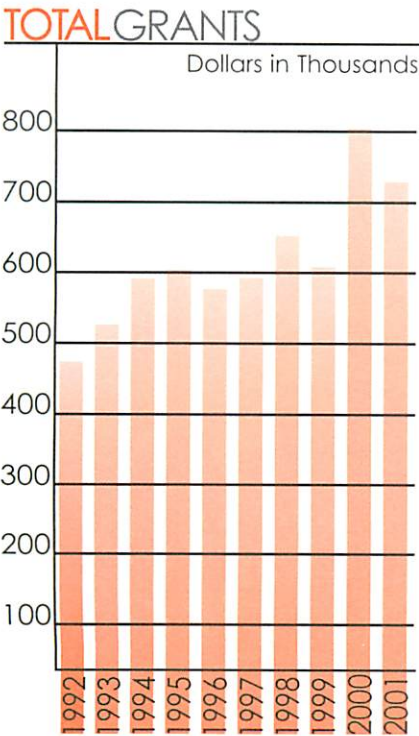
Disbursements

Grants from Unrestricted Funds	\$ 191,972
Grants from Designated Funds	356,370
Grants from Scholarship Funds	165,229
Grants from Donor-Advised Funds	19,000
Expenses of the Trust	235,185
Distribution of the Robert Harnsberger Unitrust	32,433
Total Disbursements	1,000,189
Ending Fund Balance (December 31, 2001)	<b>\$20,415,197</b>

The balances set forth on this schedule represent book values. The market value of the Trust as of December 31, 2001, totaled \$22,413,891.

Expenses of the Trust

First-Knox National Bank	Administration Fee	\$ 18,450
	Investment Advisory Fee	136,936
Community Commonwealth	Executive Director Fees and Expenses	45,524
Other Expenses		34,275
Total Expenses		<b>\$235,185</b>



● **Other Contributors to the Trust**

- Lorenzo D. Mathews, Jr.
- Curt H. Meltzer
- Louise Meltzer
- Eugene L. & Doris Miller
- Mary M. Miller
- William L. Moore
- Ohio Cumberland Gas Co.
- Ohio Magazine
- David & Colleen Olsen
- Fred A. Pond
- William E. Pond
- Dr. Gordon H. Pumphrey
- Purdy Sand & Gravel Co.
- Alan Reidel
- Walter Rudin
- John W. & Grace Rudin
- Anna M. Salisbury
- Charles W. Salisbury
- Robert W. & Doris Simpson
- Edward Starr
- Mary Blanche Stucky
- Fred A. Surlas
- James W. Tighe & Son
- Frank J. VanVoorhis
- Wilbur D. Vernon
- Paul A. Warner
- Dr. Robert L. Westerheide
- Florence L. Westlake
- Charles L. White
- Ann Wilson Memorials
- Wise Jewelers, Inc.



## ADVANTAGES OF A COMMUNITY TRUST

The Mount Vernon/Knox County Community Trust is a collection of individual philanthropic funds established by Knox County residents for a wide variety of charitable purposes. For many people, establishing a personal, philanthropic fund in the Community Trust is an attractive and economical alternative to setting up their own private foundations. The Trust offers...

### FLEXIBILITY

Through the Community Trust you can design a personal philanthropic fund that is tailored to donor desires and interests. The Trust can manage virtually any type of gift for most any charitable purpose. It serves as an endowment "bank" for all of Knox County and is unique in its services to donors and beneficiaries alike.

### COMMUNITY IMPACT

The Trust has over five decades of experience in investigating community needs, cooperatively designing solutions, and targeting philanthropic dollars for the greatest impact. The Trust can help donors identify their philanthropic purposes and direct them toward projects and solutions that effectively address our community's highest priorities.

### LEGACY

By creating a named fund in the Community Trust in your name or the name of your family, a loved one, or respected colleague, you are establishing a permanent legacy to benefit the community as a living memorial.

### ANONYMITY

Some people choose to contribute to the Community Trust anonymously through the Trust. Their identities can be shielded from the public, from our Board, and even from the beneficiaries of their gift.

### RECOGNITION

However, most donors appreciate the sustained recognition for their gifts. In so doing, they provide a good example to others in our community who might themselves consider establishing a fund of their own.



Audrey and Dean Spearman (left) have created the "Rollin' Buckeye" Scholarship Fund to benefit area students attending The Ohio State University. They are pictured here with Community Trust Treasurer Sally Nelson after they placed a winning bid in the annual "Food For The Hungry" Gingerbread House auction.



## SIMPLICITY

Most funds can be established by means of a simple one-page governing document. Creating a fund in the Community Trust is an easy and convenient way to manage all your charitable giving. Since the Trust has no programs of its own and carefully monitors its modest expenses, more of the income goes to work for local charitable purposes.

## PERMANENCE

Many donors create permanent endowment funds that will benefit the community, in their name, forever. Should the original purpose of the fund become obsolete by the passage of time, the Trust's board can redirect the fund to the nearest alternative use without a lengthy and costly court proceeding. It does this through its variance power, a distinguishing characteristic of community trusts. This provides you the assurance that your original intent will be honored and fulfilled despite changing circumstances.

## GEOGRAPHIC FLEXIBILITY

The Community Trust has, as its primary focus, the communities of Knox County, where the Trust has particular familiarity and competence in assessing needs and designing solutions. However, donors may recommend that grants from their fund partially benefit a nonprofit organization outside our community, provided that the Trust can confirm that the IRS classifies these grantees as public charities.

## TAX BENEFITS

As a public charity, a community trust offers the maximum level of tax benefits. You can contribute almost any type of property: cash, stocks, closely held securities, real estate, life insurance or personal property. (We will assist you with reporting requirements so you will be sure that everything is done correctly.) Furthermore, by creating a fund in the Community Trust, you can integrate your contributions with your overall financial and estate planning.

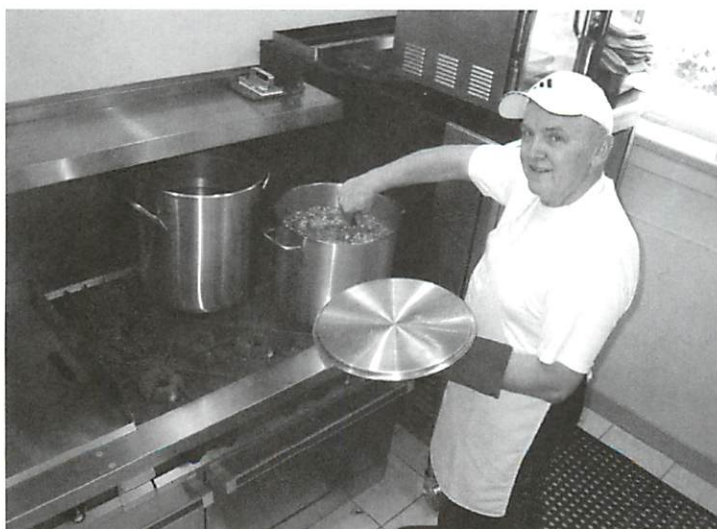
## COST EFFECTIVENESS

Because it manages many charitable funds, the Community Trust can pool its investments and contain administrative costs while providing comprehensive management services.

## RESPONSIBLE STEWARDSHIP

The Trust is stewarded by an active and knowledgeable board of local community leaders. They oversee its investments, administration, and grantmaking. The trustee of the Community Trust of Mount Vernon/Knox County, since 1944, is First-Knox National Bank.

Station Break senior center's **David Cummings** tends a kettle of mixed vegetables simmering on the new commercial range purchased with Community Trust funding.



## FOR MORE INFO

The Community Trust offers several specialized publications to assist you and your advisors in considering your charitable options under a variety of circumstances. If you would like to receive a copy of any of these publications, please let us know. We will be happy to work with you or your financial/legal advisors to create a charitable fund tailored to your interests and needs.

## CONTACT INFO

Sam Barone, Executive Director  
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Mount Vernon/Knox County  
One South Main Street  
P.O. Box 1270  
Mount Vernon, OH 43050  
Tel: 740-392-3270  
Fax: 740-399-5296  
Email: [thefoundation@firstknox.com](mailto:thefoundation@firstknox.com)

The Mount  
Vernon/Knox County  
Community Trust  
gratefully  
acknowledges **Kay  
Culbertson** and *The  
Mount Vernon News*  
for their generous  
donation of the Trust's  
Tab Section.



