



**COMMUNITY FOUNDATION OF MOUNT VERNON & KNOX COUNTY**  
*2002 Annual Report*

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## FOUNDATION BOARD



**Douglas Brenneman**  
*Appointed by  
Foundation Board*



**Thomas R. Fosnaught**  
*Appointed by  
Foundation Board*



**L. Bruce Levering**  
*Appointed by  
Common Pleas and  
Probate Judges*



**Robert L. Rauzi**  
*Secretary  
Appointed by  
Foundation Board*



**John D. Ellis**  
*Vice-Chairman  
Appointed by  
City Council*



**Ronald Godfrey**  
*Appointed by  
Foundation Board*



**Sally Nelson**  
*Treasurer  
Appointed by  
Foundation Board*



**Dr. Deborah Reeder**  
*Appointed by  
Foundation Board*



**Dr. E. LeBron Fairbanks**  
*Appointed by  
Foundation Board*



**Joan Jones**  
*Appointed by  
Chamber of Commerce*



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



**Dennis L. Snyder**  
*Appointed by  
National City Bank*

*Board members and secretary serve  
without compensation.*



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## ON THE COVER

*This westward view from 1,000 feet above S.R. 308 shows the new Wolf Run Regional Park in the foreground, adjacent to the Coshocton Road and Yauger Road business corridors.*

## FOUNDATION STAFF

**Samuel Barone**  
*Executive Director*



**Ian Watson**  
*Investment Manager  
First-Knox  
National Bank*



**Gordon Yance**  
*President, First-Knox  
National Bank*

## OTHERS WHO HAVE SERVED...

### Past Distribution Committee Members:

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.

**Past Secretaries:** Fred Barry, Jr., James J. Cullers, Charles M. Zelkowitz.



## THE YEAR IN REVIEW

### *Foundation was key to the creation of the new Wolf Run Regional Park*

**A** less confident Community Foundation may have reacted to the slack investment market of 2002 with a degree of timidity. I am pleased to report, on the contrary, 2002 was a year of growth, solid earnings, and aggressive funding of projects that helped our community.

Foundation involvement throughout Knox County was typically diverse with more than \$777,000 in grants awarded, an increase of about \$45,000 from FY 2001. One gift merits special mention, not only for its magnitude, but for the role it played in leveraging a major state grant for Knox County. Indeed, the Foundation's gift to the Knox County Park District of a 93-acre tract at the corner of Yauger and Upper Gilchrist Roads set in motion a chain of events that will impact the area for generations to come.

In May of 2001, the Knox County Park District was unable to win passage of a .5 mil levy that would have generated matching funds to apply for a Clean Ohio Grant to purchase the 167-acre Prescott Family farm situated along Yauger Road, contiguous to the Knox Woods preserve. As development interest in the area heated up, the Park District became concerned the environmentally diverse area might be lost forever.

The Park District's interest in preserving the beautiful terrain, and in slowing the eastward sprawl of Mount Vernon, was shared by at least two other groups – the Owl Creek Conservancy and Kenyon College's Philander Chase Corporation, the latter of which purchased the Prescott property in expectation of the Knox County Park District eventually obtaining matching funds for a Clean Ohio Grant.

Members of the Community Foundation board were naturally aware of the Park District's pressing need for local funding, and proposed a creative solution. It was perhaps more destiny than acci-

dent that the Foundation had four years earlier accepted from Mary M. Miller a gift of real estate at the intersection of Yauger and Upper Gilchrist Roads, which also happened to adjoin the Prescott Farm. With a market value of more than \$219,000, the Miller property would provide the Park District adequate local match to qualify for a \$614,000 Clean Ohio Grant.

Subsequently, the Knox County Commissioners deeded Knox Woods to the Park District and, thus on December 9, 2002, Wolf Run Regional Park, an impressive 290-acre public land preserve, was born. It was truly one of those events that demonstrated the creative potential of a community foundation.

**O**ne year ago, I reported to you subtle changes were afoot with the anticipated July 1, 2002, reorganization of the 58 year-old "community trust" into a "community foundation." That transition occurred seamlessly, and we now have in place a more nimble committee system to guide the development and distribution activities of the Foundation. With the assistance of our new part-time executive director, our

distribution committee published new "Guidelines for Grantmaking" (see pg. 28) and computerized our regular grant and scholarship grant applications. The development committee meanwhile considered new fundraising models that will hopefully broaden the base of Foundation donors.

Since the publication of our last annual report, we have also adopted a new Community Foundation logo, which was developed and donated by a local business development concern (see pg. 24). An additional logo you will be seeing in our publications is that of "Leave a Legacy," a program of the

Central Ohio and the National Planned Giving Councils, which we have recently joined. Through "Leave a Legacy" affiliated charities and financial planners will share ideas about engaging our communities in productive philanthropic partnerships.

Finally, on behalf of the entire Community Foundation board and administrative team, let me thank each of you for your contributions and expressions of support in the past and in the future.

– Mark R. Ramser, Chairman



*Mary M. Miller chats with Foundation Chair Mark Ramser about the property which is now Wolf Run Regional Park.*

# SUMMARY OF FOUNDATION FUNDS

*The Community Foundation is comprised of 191 different funds, which are grouped into five major fund categories based on their modes of distribution. Community Foundation assets increased \$1,311,165 (6.4%), net of contributions and income totaling \$2,286,075, and grants and expenses totaling \$974,910. The pages that follow profile the fund categories in detail.*

	<i>Dec. 31, 2002</i>	<i>Dec. 31, 2001</i>
<b>UNRESTRICTED FUNDS*</b>	<b>\$7,204,234</b>	<b>\$7,022,945</b>
<b>MEMORIAL FUNDS</b>	<b>\$2,886</b>	<b>\$3,184</b>
<b>DESIGNATED FUNDS</b>	<b>\$7,774,199</b>	<b>\$7,487,152</b>
<b>DONOR-ADVISED FUNDS**</b>	<b>\$724,294</b>	<b>\$533,454</b>
<b>SCHOLARSHIP FUNDS</b>	<b>\$6,020,749</b>	<b>\$5,368,462</b>
<b>TOTAL FOUNDATION FUNDS</b>	<b>\$21,726,362</b>	<b>\$20,415,197</b>

\* The 2002 unrestricted fund balance includes a gift of real estate to the Knox County Park District with a book value of \$75,522. The actual appraised value of the gift at the time of transfer to the Trust in 1998 was \$405,707. Terms of the life estate, through which the gift was made, result in the lower book value reported.

\*\* Donor-advised funds were reported as designated funds prior to 2002. The 2001 donor-advised fund total is shown separately above for comparison purposes only.

## UNRESTRICTED FUNDS

### FUND BALANCES, GRANTS AND CONTRIBUTIONS

Unrestricted funds provide the Foundation's board of directors maximum flexibility in meeting the emerging needs of our community. In 2002 "Guidelines for Grantmaking" (see page 28) were adopted to assist prospective grantees in authoring small and large grant applications consistent with the Foundation's mission. Grants are currently made from the aggregate income of all unrestricted funds. Grants made in 2002 from unrestricted funds are listed following this statement of individual fund balances and contributions to unrestricted funds. Several funded projects from 2002 are also profiled beginning on page 6.

ARIEL CORPORATION	\$206,162
<i>Contributions to the fund in 2002</i>	<i>\$30,000</i>
THOMAS D. BADGER MEMORIAL FUND	\$1,327
<i>Contributions to the fund in 2002</i>	<i>\$100</i>
FRANK L. & ANNA BEAM FUND	\$15,467
HENRY L. & ALICE M. BEECHER FUND	\$5,817
LUKE B. BIGGS FUND	\$145,069
RALPH L. & DORIS BOYER FUND	\$149,682
CHARLES F. COLVILLE FUND	\$1,546

JAMES H. DEBES FUND	\$154,539
JENNIE J. DEBES FUND	\$228,404
MR. & MRS. FRANK L. FAIRCHILD FUND	\$2,320
HARRY & LOVELLA FOSTER FUND	\$110,302
WILLIAM A. MOORE & GERALDINE MOORE FOWLER FUND	\$5,043
<i>Contributions to the fund in 2002</i>	<i>\$5,000</i>
GENERAL FUND OF THE TRUST	\$2,057,415
<i>Contributions to the fund in 2002</i>	<i>\$3,425</i>
HEADINGTON FAMILY FUND	\$1,546
DR. GEORGE & LUCILE IMHOFF FUND	\$1,748
FRED W. KAHRL FUND	\$1,546
KNOX COUNTY SAVINGS BANK FUND	\$6,187
LAMB GLASS COMPANY FUND	\$7,732
R. M. LAMB FUND	\$1,546
LAWRENCE & JOSEPHINE LEWIS FUND	\$30,364



The City of Mount Vernon acquired the retired B&O Railroad Station on West High Street with the assistance of the Community Foundation. Restoration activities are currently underway involving both paid contractors and volunteers.



THE MOUNT VERNON BRIDGE COMPANY FUND	\$11,601
OHIO MAGAZINE FUND	\$3,552
NANCY J. PAGE FUND	\$182,366
HAVILAH PHELPS FUND	\$5,900
MARGARET POLAHAR MEMORIAL FUND	\$3,179
POND MOTORS SALES FUND	\$618
J. R. & LORENE PURDY MEMORIAL FUND	\$881,819
<i>Contributions to the fund in 2002</i>	\$15,678
RESIDENTIAL HOMES OF KNOX COUNTY	\$21,849
RUDIN COMPANY FUND	\$15,467
J. W. RUDIN JR. FUND	\$1,546
J. W. RUDIN SR. FUND	\$3,356
W. M. RUDIN FUND	\$1,546
SANDERSON-SALISBURY MEMORIAL FUND	\$47,623
<i>Contributions to the fund in 2002</i>	\$12,422
BERTA H. SCHNEBLY FUND	\$22,303
BELLE SHRONTZ FUND	\$943,723
ANNIE SOMMERVILLE FUND	\$1,546
MRS. WALTER SPERRY FAMILY FUND	\$4,341
BLANCHE STEVENSON FUND	\$14,937
HARRY STRODTBECK FUND	\$1,546
MARY BLANCHE STUCKY FUND	\$14,114
FRED A. SURLAS FUND	\$2,320
FREDERICK & CAROL SURLAS FUND	\$5,494
SYMPOSIARCHS FUND	\$1,068



Foundation Park along the banks of the Kokosing near Downtown Mount Vernon is in the early stages of development, but is already enjoyed by nature lovers and flocks of Canada geese.

ZENNO & MAE TAYLOR GENERAL FUND	\$497,957
PERRY & LOUISE TRINKER FUND	\$13,042
<i>Contributions to the fund in 2002</i>	\$1,000
CLAUDE F. TURBEN FUND	\$1,546
JEAN ANN WAGNER FUND	\$79,596
WILLIAM KAY WALKER FUND	\$911
BEATTY B. WILLIAMS MEMORIAL FUND	\$945,633
EDITH WILLIAMS FUND	\$20,660
LAWRENCE F. & RUBY WILLIAMS FUND	\$287,130
ARTHUR C. & ADA B. WOLFE FUND	\$30,934
JACK ZELLER MEMORIAL FUND	\$1,249

**GRANTS FROM UNRESTRICTED FUNDS**

<b>Centerburg Local Schools</b>	<b>\$15,000</b>
A grant toward the construction of the Centerburg Wellness Center.	
<b>Chapter of Central Ohio Diabetes</b>	<b>\$1,300</b>
A grant to send 10 diabetic children to summer camp.	
<b>College Township Trustees</b>	<b>\$10,000</b>
The first installment of a grant for the restoration of Quarry Chapel.	
<b>Columbia Elementary School</b>	<b>\$6,000</b>
A grant to purchase playground equipment.	
<b>Community Foundation General Scholarship Fund</b>	<b>\$40,000</b>
Combined with income from designated scholarship funds, this allocation enabled \$187,667 in scholarships to be awarded in 2002. (See page 20 for a list of 2002 recipients.)	
<b>The Dan Emmett Music and Arts Festival</b>	<b>\$2,000</b>
A grant to establish a recurring fundraiser.	
<b>Food for the Hungry</b>	<b>\$5,000</b>
A grant for 2002 support.	
<b>Howard Township Trustees</b>	<b>\$5,500</b>
The first installment of a grant to create three new baseball fields.	
<b>Junior Achievement</b>	<b>\$2,000</b>
The final installment of a grant to expand educational programming to additional Knox County schools.	
<b>Kenyon College</b>	<b>\$40,000</b>
The final installment of a grant toward the revitalization of the college's music complex.	
<b>Knox County Career Center</b>	<b>\$3,000</b>
A grant for the purchase of materials for preschool children.	
<b>Knox County Convention and Visitors' Bureau</b>	<b>\$3,300</b>
A grant to purchase tents, chairs and tables for the Dan Emmett Music & Arts Festival.	

<b>Knox County Educational Service Center</b>	<b>\$1,000</b>
A grant for materials and equipment for autistic children.	
<b>Knox County Educational Service Center</b>	<b>\$3,500</b>
For the ninth consecutive year, the Foundation has underwritten the Youth Enrichment Series.	
<b>Knox County Park District</b>	<b>\$75,522</b>
Distribution of real estate to help fund acquisition of Wolf Run Park.	
<b>Kokosing Gap Trail</b>	<b>\$6,000</b>
A grant to assist in the purchase of a tractor and a boom-arm mower.	
<b>City of Mount Vernon</b>	<b>\$20,000</b>
The first installment of a grant to help purchase and restore the retired B&O Railroad Depot.	
<b>Mount Vernon City Schools</b>	<b>\$10,000</b>
The final installment of a grant to automate elementary school libraries.	
<b>Mount Vernon City Schools</b>	<b>\$10,000</b>
A grant to purchase 30 wireless laptop computers for Elmwood Elementary School.	
<b>United Way of Knox County</b>	<b>\$1,000</b>
A grant to help sponsor the First Annual Family Fun Day.	
<b>YMCA of Mount Vernon</b>	<b>\$10,000</b>
The fourth payment of a matching grant for exercise equipment.	

**UNRESTRICTED FUNDS SUMMARY**

<b>GRANTS DISTRIBUTED*</b>	<b>\$230,122</b>
<b>CONTRIBUTIONS TO THE FUNDS</b>	<b>\$67,625</b>
<b>BALANCE OF UNRESTRICTED FUNDS</b>	<b>\$7,204,234</b>

\* Total does not reflect a \$40,000 transfer to Community Foundation General Scholarship Fund, which is included in total of scholarship grants distributed on page 19.

# Unrestricted fund enables Foundation to meet emerging needs of Knox County communities

**T**he Centerburg community had been wanting to build a new high school for more than 25 years. When state help became available and the plans for the new high school began to unfold, a new dream of an adjacent community wellness center was conceived.

To jumpstart the fundraising effort, the Community Foundation of Mount Vernon & Knox County was approached for a challenge grant. Our project would have never gotten off the ground had the Foundation not responded with an initial \$30,000 grant.

When the Mount Vernon YMCA agreed to partner with us in the venture, our 2,400 square foot plan enlarged to 4,500 square feet with the addition of 600 square feet and locker rooms. A true YMCA satellite, the center will be equipped and staffed by the Mount Vernon YMCA.

The expanded section of our dream had to be underwritten before construction could continue on its course.

The Community Foundation of Mount Vernon & Knox County helped again to motivate donors with an additional \$25,000 cap-stone challenge grant for the expanded section.

The Centerburg side of Knox County will now have a fitness facility that will not only serve the community but also will educate Centerburg students through a hands-on knowledge of lifetime fitness.

Many great conversations between community members and students will occur. The role that the Community Foundation of Mount Vernon & Knox County played in this wonderful community dream has been extraordinary. Our Centerburg community says, "thanks!"

—Dan Stevens  
Wellness Center Project Director



*Craftsman Brian Wilson is one of several at work restoring the Quarry Chapel near Gambier. A Foundation grant is facilitating the effort.*

**I**n May 2002 a late spring thunderstorm blew a large oak tree onto the roof of the historic Quarry Chapel, about a mile east of Kenyon College. Built by the college's stone masons in 1863 as a place for their own worship, Quarry Chapel is one of the county's pre-eminent historical sites, gaining National Landmark status in 1973. Deconsecrated by the Episcopal Church in the late 1930s, the building has remained vacant and unused for about 75 years. Its adjoining cemetery, however, has remained active under the supervision and ownership of the College Township trustees.

A year prior to the fateful storm, the township



trustees had authorized the Quarry Chapel Restoration Society to raise money to restore the chapel to its 1863 condition. The storm brought those efforts to a halt.

Recognizing the architectural importance of the structure and its value to Knox County, the Community Foundation enabled the Restoration Society, through a \$25,000 grant to the College Township trustees, to cover the costs of the storm damage. At the same time, College Township trustees removed the fallen tree, contributed \$5,000 towards repairs, insured the structure for \$100,000, and agreed to remove a second tree that threatened the building. The Restoration Society used the Foundation's grant to repair the roof, replacing all damaged structural work, broken slates, down-spouting and gutters.

The Foundation's grant also covered the costs for repair of all the interior damage to the stone walls, the straightening and stabilization of the foundation and walls, the repair of the window arches, and the erection of concrete pilings to support the floor.

A year later, with the Foundation's support, all of the storm damage has been repaired and the full restoration of Quarry Chapel is underway. All of the roof and stone work is scheduled for completion in 2003. Designs for the stained glass windows are nearly complete, and glassmakers will soon begin to construct the windows. Oak floor joists and the hardwood sub-floor and window jams will also be installed.

Shortly thereafter the restoration committee will complete and install the windows, repair the ceiling, replace all the interior woodwork, build pews, and repair the adjoining sacristy.

Expectations are to complete the restoration, inside and out, by the winter of 2004-05. Once completed the township trustees plan to make the building available for weddings, funerals, receptions, and other appropriate activities, as well as open it to the public as a historical site and an example of a community-based restoration project.

*—Quarry Chapel Restoration Committee*

The Dan Emmett Music & Arts Festival received a partner contribution from the Community Foundation in 2002, the purpose of which was to purchase 12 Dan Emmett Music & Arts Festival Bells. The bells were auctioned at the Festival.

The Festival has been challenged from its inception for a reliable, long term funding methodology. Since there is no admission or gate fee, the costs rest heavily on the sponsors of the event. The Festival's board of trustees felt the need to develop a firm financial base from which to launch the event each year, beyond the critical sponsor contributions. The Festival's long term plan includes having a reserve to perpetuate the celebration in the event of adverse circumstances (such as three days of rain).

The purchase of the bells with the Foundation grant has allowed us to begin this process.

The 2002 bell auction

grossed \$12,000. A portion (\$2,500) of this amount was put into savings and the rest will be used as start up capital for subsequent festivals. The auction will be an annual festival activity on Saturday night. The Foundation's grant will help assure the future of this great event.

*Pat Crow, Festival Director*



*The Camp Chase Fife & Drum Corp entertains at the Dan Emmett Music & Arts Festival, a frequent recipient of support from the Community Foundation*

Two years ago, it was a dream. One year ago, it was a cornfield. Today, we have three new baseball fields for the Howard Youth League. Our small league was faced with a challenge: find and acquire land, and create a ballpark. The land was found with the help of the Knox County Commissioners, and the ballpark was created with the generous financial support of \$11,000 from the Community Foundation of Mount Vernon & Knox County. We knew the funding was going to be a major obstacle, and the first place we turned to was the Foundation.

Local community members and businesses have subsequently been generous in supporting our cause. Many volunteers have devoted countless hours into making our dream a reality. A quote from a famous movie said, "If you build it, they will come." And come they have. It is a wonderful sight to see so many ball players and their families enjoying the new fields on Pipesville Road. When you are out for a ride in the Howard area, please make it a point to stop and admire our new fields; and keep in mind, that with the financial support from the Community Foundation of Mount Vernon & Knox County, dreams come true.

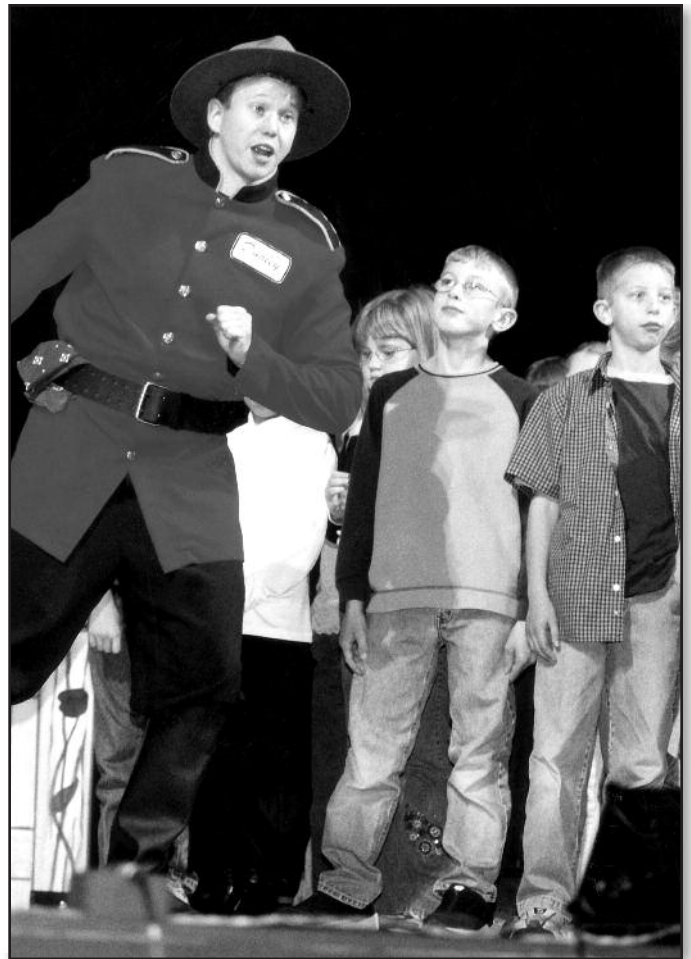
*—Howard Youth League Board*

The Knox County Convention & Visitors Bureau requested and received a \$3,300 partner contribution from the Community Foundation in 2002 for the purpose of purchasing several tents, tables and folding chairs. The tents and chairs are dedicated for the use of non-profit entities in their staging of events related to increasing tourism and other related community activities.

The tents, tables and chairs were used extensively at the Dan Emmett Music & Arts Festival. Subsequently, the equipment was used at the Fredericktown Tomato Show, the Centerburg Oldtime Farming Festival, and the Knox County Fun Day. Local organizations are rapidly becoming aware of their availability and using the tents and chairs to facilitate their efforts in the community.

*—Knox County Convention & Visitors Bureau*

Students in Mount Vernon and Knox County in grades one through seven received quality enrichment and cultural experiences thanks to a \$3,500 grant from the Community Foundation of Mount Vernon & Knox County. Although school districts provide busing of their students, Knox County Commissioners provided use of the Memorial Theater, and the



*Y.E.S. presentations like this one by Columbus Youth Theater typically get students into the act.*

Community Concert Association provides assistance with one concert, the Foundation's grant funds all of the remaining performers and technical support for this program, as it has since the early 1990s.

In the 2002-03 school year seven concerts were staged for public and parochial students throughout Knox County. Each grade level of approximately 700 students enjoyed one concert during the year. This year we showcased the local talents of Prairie Orchid and several artists available to us through the Greater Columbus Arts Council. Columbus Junior Theater, Opera Columbus, Women in Jazz, Roger Jerome (Shakespeare) and Eric Paton (world-class drummer) performed age-appropriate programs that interested and instructed each grade level.

Thanks to the Foundation this program gave some 4,900 students in Knox County an enjoyable and educational opportunity to be enriched by talented, professional performers.

*—Knox County Educational Service Center*





*Librarians Peggy Mavis (left) and Pat Callam demonstrate new equipment with West Side student Erin Gordon. The Community Foundation supported an automation project in all seven Mount Vernon elementary libraries.*

Prior to 2002, elementary school libraries in the Mount Vernon City Schools were still using outdated manual circulation systems and physical card catalogs and shelf lists. Students, staff, and library aids of the elementary school libraries could not easily search and access the holdings of the other libraries, nor did they have ready access to the holdings of the middle school, high school or public libraries. Students and teachers would have to leave their respective classrooms to determine if materials were available on their libraries' shelves.

Teachers in every school in the Mount Vernon City School District can now locate and share library materials across the district and the state from their classrooms. Students in the elementary schools in our district can now access the holdings in their libraries and a core of electronic resources from any internet accessible computer at school or from home just as easily as their counterparts in the middle and high schools.

This project was accomplished through a cooperative effort involving the Community Foundation of Mount Vernon & Knox County, Title VI federal

education funds and local school funds, combining to automate all seven of the elementary libraries. During the 2001-2002 school year the libraries' card catalogs were converted to computerized form, the computer equipment, software and networking components were purchased and put in place, and library aides, students and teachers were trained in the use of new equipment and programs. Bar codes were affixed to library materials and students and teachers were assigned bar code identifications for checking out materials. Beginning with the 2002-2003 school year all libraries were operating more efficiently under the new automated system. Interloans among libraries are easier to transact and reporting systems are easier to administer.

Students have welcomed and easily adapted to the changes in the elementary school libraries. There are fewer overdue books and more accurate accountability for lost and damaged books with the new system. The Mount Vernon City School District is committed to the ongoing support of the automation system for the seven elementary school libraries.

*—Peggy Mavis, Mount Vernon Schools Librarian*



**D**anville Elementary and Middle School benefited from a \$1,000 grant that the Knox County Educational Service Center received from the Community Foundation in 2002.

Money allocated to Danville Elementary and Middle School was used to purchase a piece of assistive technology for use with children diagnosed with Pervasive Development Disorder.

The assistive technology device is a touch window computer screen that serves the same function as a mouse. However, it requires reduced fine motor skills and eye-hand coordination. All the special screen requires is a touch of the finger to control the computer. Because of these features, children with Pervasive Development Disorder (autism) can manipulate the computer with greater ease, as do their peers in a typical classroom.

Danville Elementary and Middle School strives to create a learning environment that includes all students. With the Foundation grant, we are better able to meet the unique needs of all our students.

*—Danville Local Schools*

**F**or several years, Elmwood Elementary School sought to provide its students a computer lab. But because of space issues within the building, all available rooms were needed for regular classrooms. After investigating many possibilities, wireless technology was identified as the most viable solution.

In March of 2002, we pursued the idea of wireless technology. Funding for this project was a critical issue. We requested and received funds from the Mount Vernon Board of Education, the Elmwood PTO, Ariel Corporation, and importantly, a \$10,000 grant from the Community Foundation of Mount Vernon & Knox County.

During the summer of 2002, we were able to purchase 28 IBM Thinkpad laptop computers that were equipped with wireless technology and a dual battery system. The computers are stored, recharged and are easily moved from room to room on a special cart. Our plan also included the purchase of the Success Maker software. This research-based software provides an individualized learning path for each student, grades 1-5 in the basic skills of reading, language arts and mathematics.

In August 2002, starting on the first day of school, Elmwood students began using the computers. Every student uses the lab for 30 minutes each day. With the use of the wireless lab and the Success Maker software, teachers have seen good academic gains throughout the school year. The software builds a very strong, self-paced, individualized foundation of learning.

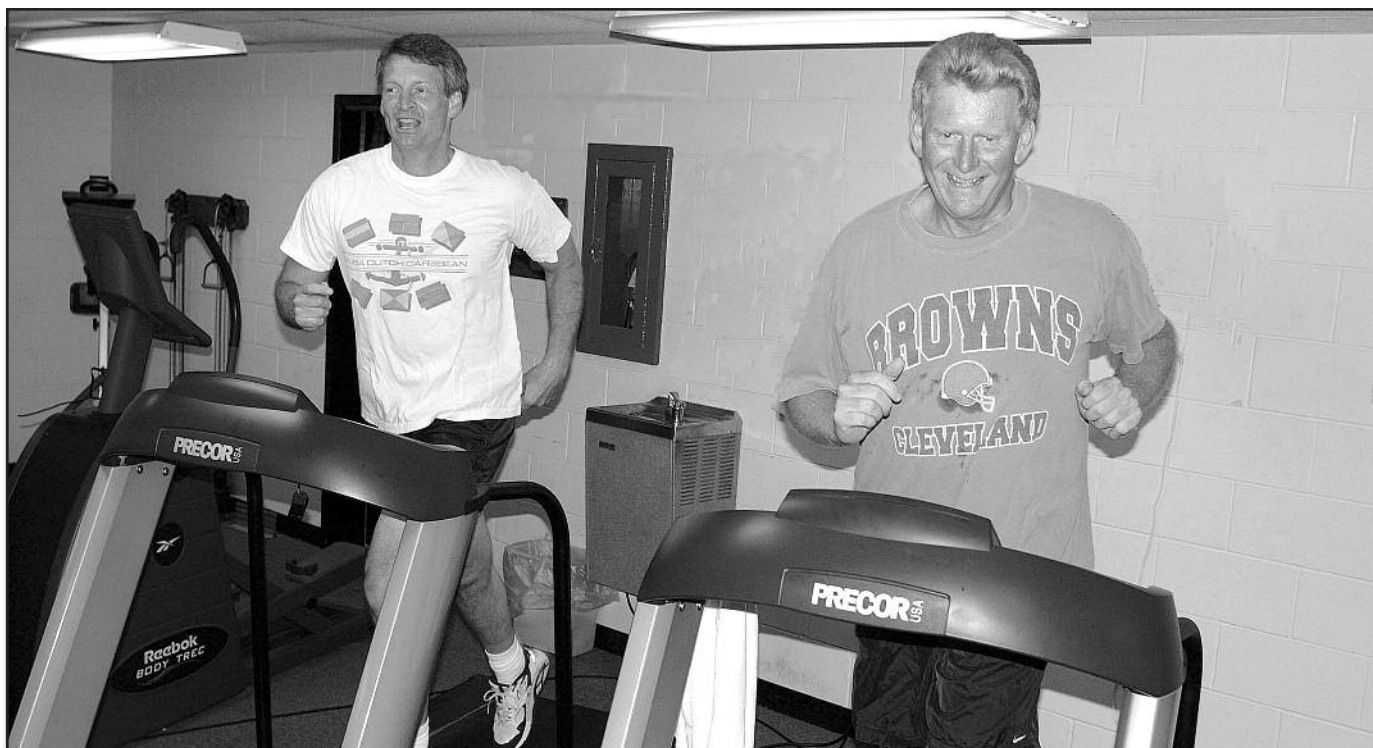
Elmwood Elementary School greatly appreciates the Community Foundation's generous contribution to this project. It took the cooperation and commitment of several organizations to make this program possible. The portable computer lab is a wonderful tool that helps our students make greater academic gains.

*—Cynthia Miller, Elmwood School Principal*

**W**hat happens when a group of resourceful non-profit organizations come together to create an event that impacts families? The result is a fun event with something for all ages, at absolutely no cost to participants!



*Elmwood Elementary aide Christine Hohman guides Cortney Warren in the use of Community Foundation-funded wireless laptop technology.*



*Mark (left) and Doug Leonard put new Foundation-purchased treadmills through their paces at the local YMCA.*

Thanks to local supporters like the Community Foundation of Mount Vernon & Knox County, the Asset Builders Coalition, a group of area non-profits, and community partners, was able to provide quality family activities at the Fairgrounds to more than 1,000 Family Fun Day attendees on September 15, 2002.

Family Fun Day was an opportunity for families to take time to make memories together. Whether it was the petting zoo, remote control car demonstrations, wall climbing or the Hunky Junky Art Show, participants enjoyed spending quality time together as families.

Since September is recognized nationally as the month of the family, Asset Builders developed Family Fun Day in an effort to provide support to local families so children would have a better chance of growing up to be healthy, caring and responsible adults. Assisted by a \$1,000 donation from the Community Foundation of Mount Vernon & Knox County, families learned inexpensive ways to have fun and spend time together, thereby opening lines of communication within the family.

*—Jennifer Odenweller, United Way Director*

**I**n 1999, the YMCA of Mount Vernon, Ohio reviewed its capital needs and concluded that the Fitness Center equipment was in need of being either repaired or replaced. Many of

the pieces were 10 to 12 years-old, and with the high usage demanded of this equipment, the YMCA recognized the importance of purchasing equipment to meet the ongoing needs of our customers, and to allow for future growth for the facility. While there were many other capital needs, it was clear making the facility state-of-the-art was a high priority.

The YMCA requested \$50,000 from the Community Foundation of Mount Vernon & Knox County in 1999. This request was to cover the costs of replacing 13 of the old Nautilus machines that had been in operation for more than 20 years, as the Nautilus equipment was no longer bio-mechanically and ergonomically sufficient.

The request for \$50,000 was granted, with the amount being distributed in increments of \$10,000 per year over five years. The Foundation stipulated that their support was to be used for new equipment only. The YMCA has fulfilled this request, and the Foundation's five-year commitment has given the YMCA the opportunity to solicit other financial support over an extended period of time. This has proven to be very productive.

The YMCA of Mount Vernon appreciates the Community Foundation's continued support of its mission to "build healthy spirit, mind and body for all." The updated Fitness Center now exceeds member expectations due to the generous support of the Foundation.

*—Wayne Uhrig, YMCA Executive Director*



## DESIGNATED FUNDS

### FUND BALANCES, GRANTS AND CONTRIBUTIONS

*Designated funds allow donors to specify terms for the distribution of income and/or principal to charities of their choosing, confident their wishes will be honored in perpetuity.*

<b>ALTRUSA FUND</b>	<b>\$16,454</b>
Knox County Career Center	\$174
Mount Vernon City Schools	\$174
Public Library of Mount Vernon and Knox County	\$174
<b>FRED BARRY JR. SCHOLARSHIP FUND</b>	<b>\$37,250</b>
Kenyon College	\$1,231
<b>MILDRED BENNETT FUND</b>	<b>\$47,702</b>
East Knox Local School District	\$789
Knox County Career Center	\$789
<b>ROBERT BLACK FUND</b>	<b>\$118,542</b>
Knox County Mental Health	\$3,921
<b>J. GORDON BONE, JR. STUDENT AID FUND</b>	<b>\$665,824</b>
Kenyon College	\$16,511
Mount Vernon Nazarene University	\$5,504
<b>STERLING B. &amp; EDNA B. BRADDOCK FUND</b>	<b>\$11,597</b>
Ebenezer United Methodist Church	\$384
<b>GORDON AND ROBERTA CHALMERS FUND</b>	<b>\$244,054</b>
Kenyon College Library	\$6,598
<b>CHARACTER BUILDING ACTIVITIES FUND</b>	<b>\$3,501</b>
<b>GARFIELD AND MAZIE COLGIN MEMORIAL FUND</b>	<b>\$106,363</b>
Messiah Church	\$2,087
<b>HELEN H. COOKE MEMORIAL FUND</b>	<b>\$655,729</b>
First Congregational United Church of Christ	\$18,149
<b>GEORGE CULBERTSON FUND</b>	<b>\$9,116</b>
<b>LEONA CULBERTSON FUND</b>	<b>\$318</b>
<b>JENNIE DEBES HEART FUND</b>	<b>\$34,648</b>
Knox County Heart Association	\$278



*Designated funds assist institutions such as Mount Vernon Nazarene University (above) and the Public Library of Mount Vernon and Knox County in fulfilling their respective missions.*

<b>STACY DOYLE MEMORIAL FUND</b>	<b>\$51,893</b>
Kokosing Gap Trail	\$1,507
<i>Contributions to the fund in 2002</i>	<i>\$30,000</i>
<b>FIRST CONGREGATIONAL UNITED CHURCH OF CHRIST FUND</b>	<b>\$3,461</b>
First Congregational United Church of Christ	\$114
<b>FIRST CONGREGATIONAL UNITED CHURCH OF CHRIST – BUILDING FUND</b>	<b>\$2,459</b>
First Congregational United Church of Christ	\$81

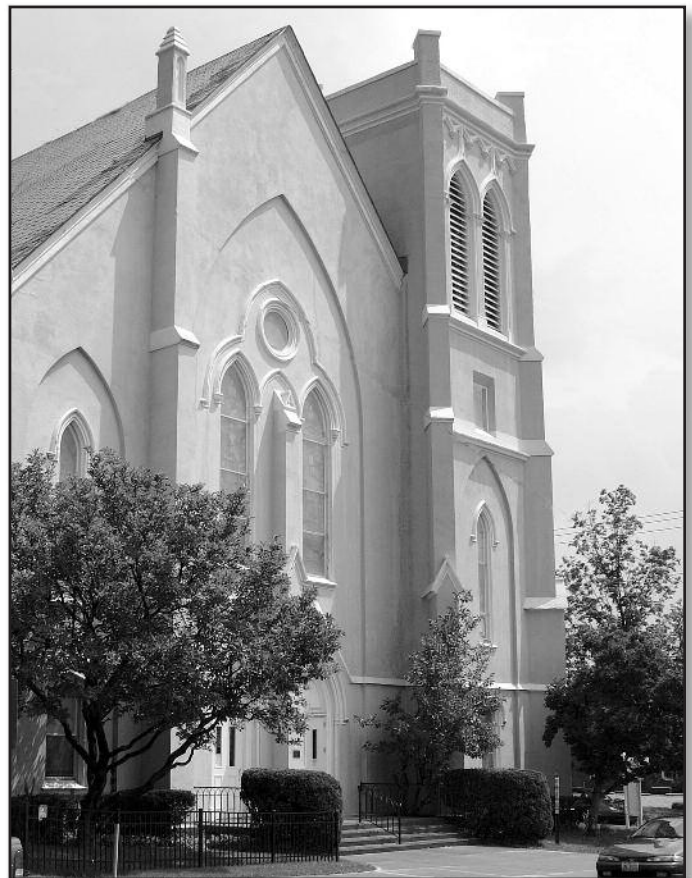


<b>FIRST CONGREGATIONAL UNITED CHURCH OF CHRIST – HOWARD TARR FUND</b>	<b>\$5,029</b>
First Congregational United Church of Christ	\$138
<i>Contributions to the fund in 2002</i>	<i>\$2,175</i>
<b>FIRST CONGREGATIONAL UNITED CHURCH OF CHRIST – WALTER STARR FUND</b>	<b>\$2,825</b>
First Congregational United Church of Christ	\$93
<b>THE FRIENDS CEMETERY FUND</b>	<b>\$24,429</b>
Friends Cemetery	\$784
<b>WILBUR GAUNDER FUND FOR HARCOURT PARISH EPISCOPAL CHURCH</b>	<b>\$105,928</b>
Harcourt Parish Episcopal Church	\$3,309
<b>WILBUR GAUNDER FUND FOR HOSPICE OF KNOX COUNTY</b>	<b>\$105,928</b>
Hospice of Knox County	\$3,309
<b>WILBUR GAUNDER FUND FOR KNOX COUNTY HUMANE SOCIETY</b>	<b>\$100,831</b>
Knox County Humane Society	\$3,154
<b>WILBUR GAUNDER FUND FOR KNOX COUNTY RED CROSS</b>	<b>\$105,928</b>
Knox County Red Cross	\$3,309
<b>WILBUR GAUNDER FUND FOR THE SALVATION ARMY</b>	<b>\$100,831</b>
Salvation Army	\$3,154
<b>GELSANLITER FAMILY FUND</b>	<b>\$15,249</b>
Kenyon College	\$57
<b>GEORGE AND RUTH GELSANLITER MEMORIAL FUND</b>	<b>\$21,189</b>
Interchurch Social Services	\$350
Hospice of Knox County	\$350
<b>HANNAH BROWNING HOME FUND</b>	<b>\$707,691</b>
Faith Lutheran Church	\$3,566
First Congregational United Church of Christ	\$3,568
First Presbyterian Church	\$3,568
Gay Street United Methodist Church	\$3,566
Mulberry United Methodist Church	\$3,568
St. Paul's Episcopal Church	\$3,568
<b>ELLEN M. HECKLER MEMORIAL FUND</b>	<b>\$3,556</b>
Ohio Eastern Star Home	\$118

<b>H. GRANT HECKLER MEMORIAL FUND</b>	<b>\$5,467</b>
Gay Street United Methodist Church	\$181
<b>THOMAS E. HEINE MEMORIAL FUND</b>	<b>\$4,913</b>
Zion Lutheran Church	\$118
<i>Contributions to the fund in 2002</i>	<i>\$5,000</i>
<b>W. GLENN HESS FUND</b>	<b>\$440,713</b>
American Red Cross	\$1,562
Bladensburg Church of Christ	\$1,562
Brinkhaven Church of Christ	\$1,562
Danville Church of Christ	\$1,562
Martinsburg Church of Christ	\$1,562
Salvation Army	\$1,562
United Way of Knox County	\$1,562
Utica Church of Christ	\$1,562
<b>ZACK T. HOLLISTER FUND</b>	<b>\$2,130</b>
Bird Cemetery Association	\$70
<b>INTERCHURCH SOCIAL SERVICES FUND</b>	<b>\$98,599</b>
Interchurch Social Services	\$2,236
<b>MARGARET JAMISON CHURCH FUND</b>	<b>\$219,101</b>
First Congregational United Church of Christ	\$851
<i>Contributions to the fund in 2002</i>	<i>\$219,734</i>
<b>MARGARET LOUISE JAMISON INTERCHURCH FUND</b>	<b>\$36,517</b>
Interchurch Social Services	\$142
<i>Contributions to the fund in 2002</i>	<i>\$36,622</i>
<b>MARGARET LOUISE JAMISON YMCA FUND</b>	<b>\$36,517</b>
YMCA of Mount Vernon	\$142
<i>Contributions to the fund in 2002</i>	<i>\$36,622</i>
<b>PAULINE JAMISON KARTMAN FUND</b>	<b>\$36,659</b>
<i>Contributions to the fund in 2002</i>	<i>\$36,622</i>
<b>ALICE JEWELL FUND</b>	<b>\$922</b>
Heart of Ohio Girl Scouts	\$31
<b>F. WILLIAM KAHRL FUND</b>	<b>\$3,489</b>
St. Paul's Episcopal Church	\$115
<b>R. B. KINCAID FUND</b>	<b>\$59,021</b>
First Congregational United Church of Christ	\$864
<b>KIRACOFE FAMILY FUND</b>	<b>\$10,930</b>
First Congregational United Church of Christ	\$362

<b>KNOX COUNTY CANCER SOCIETY FUND</b>	<b>\$2,092</b>
Knox County Cancer Society	\$69
<b>KNOX COUNTY HEART FUND</b>	<b>\$2,092</b>
Knox County Heart Association	\$69
<b>KNOX COUNTY HISTORICAL SOCIETY FUND</b>	<b>\$14,457</b>
Knox County Historical Society	\$441
<b>KNOX COUNTY HUMANE SOCIETY – BARBARA S. JONES FUND</b>	<b>\$325,710</b>
Knox County Humane Society	\$8,297
<b>KNOX COUNTY MEDICAL SOCIETY FUND</b>	<b>\$1,470</b>
<b>KOKOSING GAP TRAIL FUND</b>	<b>\$1,340</b>
Kokosing Gap Trail	\$42
<i>Contributions to the fund in 2002</i>	<i>\$120</i>
<b>EMERSON LAIRD KOKOSING GAP TRAIL FUND</b>	<b>\$6,193</b>
Kokosing Gap Trail	\$201
<b>RICHARD LANDERS FUND FOR KNOX COUNTY CAREER CENTER</b>	<b>\$2,686</b>
<b>HARRIETT B. LAWLER FUND</b>	<b>\$268,609</b>
Gay Street United Methodist Church	\$3,501
Muskingum College	\$2,334
<b>LEAGUE OF FRIENDSHIP FUND</b>	<b>\$2,661</b>
Knox County Historical Society	\$88
<b>ETHEL LYMAN MEMORIAL FUND</b>	<b>\$5,940.10</b>
Public Library of Mount Vernon and Knox County	\$196
<b>JAMES K. LYMAN MEMORIAL FUND</b>	<b>\$293</b>
American Red Cross – Knox County Chapter	\$10
<b>JOHN AND GENEVIEVE MINOR FOUNDATION</b>	<b>\$4,174</b>
<b>MOUNT VERNON ACADEMIC BOOSTERS FUND</b>	<b>\$1,778</b>
<b>MOUNT VERNON HIGH SCHOOL ALUMNI FUND</b>	<b>\$1,391</b>
<b>MOUNT VERNON LIVESTOCK FUND</b>	<b>\$3,844</b>
<b>MOUNT VERNON THEATRE GUILD FUND</b>	<b>\$485</b>

<b>DANIEL PEALER FUND</b>	<b>\$4,891</b>
Mulberry United Methodist Church	\$156
<b>WILLIAM POND FUND</b>	<b>\$506</b>
<b>DR. CLYDE AND DORA PURDY FUND</b>	<b>\$15,827</b>
Gay Street United Methodist Church	\$523
<b>J. R. AND LORENE PURDY FUND</b>	<b>\$100,226</b>
Danville United Methodist Church	\$3,016
<b>RUSSELL RAMSER MEMORIAL FUND</b>	<b>\$17,340</b>
<i>Contributions to the fund in 2002</i>	<i>\$3,647</i>
<b>ARTHUR AND GRACE RAWLINSON MEMORIAL FUND</b>	<b>\$27,818</b>
St. Paul's Episcopal Church	\$763
<b>ANDY RESSING MEMORIAL FUND</b>	<b>\$7,671</b>
<b>WALTER AND JANE RUDIN FAMILY FUND</b>	<b>\$98,450</b>
<b>CITY OF MOUNT VERNON</b>	<b>\$3,058</b>



*First Congregational is one of several Knox County churches benefiting from designated funds, which have been established within the Community Foundation.*

<b>ST. PAUL'S EPISCOPAL CHURCH FUND</b>	<b>\$1,110</b>
St. Paul's Episcopal Church	\$37
<b>DELBERT C. SCHMIDT FUND</b>	<b>\$5,539</b>
Faith Lutheran Church	\$183
<b>WILLIAM A. AND PEGGY STROUD FUND</b>	<b>\$52,677</b>
<b>ZENNO AND MAE S. TAYLOR FUND</b>	<b>\$66,715</b>
First Congregational United Church of Christ	\$908
<b>MAE S. TAYLOR YMCA FUND</b>	<b>\$29,563</b>
YMCA of Mount Vernon	\$1,380
<b>MARTHA TURNER WALKER MEMORIAL FUND</b>	<b>\$1,100</b>
First Presbyterian Church	\$36
<b>UNITED WAY OF KNOX COUNTY</b>	<b>\$196,975</b>
<i>Contributions to the fund in 2002</i>	<i>\$50,000</i>
<b>JAMES R. WESTERHEIDE MEMORIAL FUND</b>	<b>\$2,253</b>
St. Vincent DePaul School	\$75
<b>AMY F. WILLIAMS MEMORIAL FUND</b>	<b>\$288,162</b>
First Congregational United Church of Christ	\$2,595

Salvation Army	\$3,568
YMCA of Mount Vernon	\$9,403
<b>BEATTY B. WILLIAMS ENDOWMENT FUND</b>	<b>\$322,063</b>
YMCA of Mount Vernon	\$17,066
<b>BEATTY B. WILLIAMS LIBRARY FUND</b>	<b>\$101,963</b>
Mount Vernon Public Library	\$1,831
<b>BEATTY B. WILLIAMS FOR YMCA ET. AL.</b>	<b>\$382,808</b>
First Congregational United Church of Christ	\$4,173
YMCA of Mount Vernon	\$4,173
National Board of YMCA	\$4,173
United Way of Knox County	\$4,173
<b>YMCA ENDOWMENT FUND</b>	<b>\$1,123,377</b>
YMCA of Mount Vernon	\$64,235
<b>YWCA GIRLS SCHOLARSHIP FUND</b>	<b>\$18,646.39</b>
YMCA of Mount Vernon	\$617

#### DESIGNATED FUNDS SUMMARY

<b>GRANTS DISTRIBUTED</b>	<b>\$256,992</b>
<b>CONTRIBUTIONS TO THE FUNDS</b>	<b>\$420,542</b>
<b>BALANCE OF DESIGNATED FUNDS</b>	<b>\$7,774,199</b>



The Kokosing Gap Trail board has earned the financial support of many individuals and organizations in Knox County, including the Community Foundation. In 2002 a Foundation grant assisted with the purchase of a new maintenance tractor.



## DONOR-ADVISED FUNDS

### FUND BALANCES, GRANTS AND CONTRIBUTIONS

Donor-advised funds provide benefactors the flexibility to make tax-deductible contributions to the Community Foundation, while reserving the right to make distribution recommendations to the board of directors.

#### JOHN AND AMY MACIONIS FUND

Mount Vernon City Schools	\$10,000
<i>Contributions to the fund in 2002</i>	<i>\$10,000</i>

#### OHIO'S JUNIOR MISS SCHOLARSHIP FUND

Scholarships to colleges on behalf of Ohio's Junior Miss contestants	\$21,386
<i>Contributions to the fund in 2002</i>	<i>\$20,046</i>



Knox County Historical Society Volunteers Irma Hood (left), Althea Hookway and Harlin Hubbell admire a Civil War era flag on display in the Harcourt Road museum. Helen E. Zelkowitz once again recommended a gift to the Society from her donor-advised fund.

<b>PLOCKI-McMANUS FAMILY FUND</b>	<b>\$100,000</b>
<i>Contributions to the fund in 2002</i>	<i>\$100,000</i>

#### MARK R. RAMSER FUND

City of Mount Vernon – B&O Railway Station	\$10,000
<i>Contributions to the fund in 2002</i>	<i>\$10,000</i>

#### SCHNORMEIER FAMILY FUND

American Heart Association	\$6,000
City of Mount Vernon – B&O Railway Station	\$5,000
First Congregational United Church of Christ	\$6,000
Habitat for Humanity	\$1,170
Hospice of Knox County	\$500
Interchurch Social Services	\$1,000
Knox County Symphony	\$1,000
Kokosing Gap Trail	\$500
Mount Vernon Nazarene University – Schnormeier Family Fund Scholarship	\$2,000
New Directions	\$1,000
United Way of Knox County	\$5,000
<i>Contributions to the fund in 2002</i>	<i>\$98,525</i>

#### C. WATKINS FAMILY FUND

Knox County Symphony	\$200
Hospice of Knox County	\$200
Mount Vernon Nazarene University	\$200
United Way of Knox County	\$1,200

#### HELEN E. ZELKOWITZ FUND

Knox County Historical Society	\$1,000
Mount Vernon Nazarene University – 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

#### DONOR-ADVISED FUNDS SUMMARY

<b>GRANTS DISTRIBUTED</b>	<b>\$95,606</b>
<b>CONTRIBUTIONS TO THE FUNDS</b>	<b>\$258,571</b>
<b>BALANCE OF FUNDS</b>	<b>\$724,294</b>

## *Ted and Ann Schnormeier value the flexibility of their Community Foundation donor-advised fund*

**W**idely known in Knox County is Ted and Ann Schnormeier's generosity in supporting a variety of charitable causes. Not so well known is the fact the Schnormeiers have chosen to make most of their contributions through a donor-advised fund within the Community Foundation of Mount Vernon & Knox County.

"Working with the Community Foundation has all the advantages of a private foundation, and none of the disadvantages," Ted explains. "As a donor, you retain the right to recommend how income from your fund will be distributed, yet you have none of the administrative responsibilities normally associated with operating your own foundation."

Schnormeier says he acquired insights on philanthropy and foundation operations serving as an executive with Jeld-Wen, Inc., one of the nation's pre-eminent window and door manufacturers. The Jeld-Wen Foundation, according to Schnormeier, adheres to a philosophy of generously supporting the communities in which its facilities are located and in which its employees live.

Schnormeier spent most of his 37-year career with Jeld-Wen as general manager of the local Wenco operation. He also served Jeld-Wen as senior vice-president with responsibility for all window manufacturing operations, and continues to sit on Jeld-Wen's board of directors.

"Ann and I have adopted a similar philosophy in sharing our resources, and feel the Community Foundation is the ideal vehicle for making contributions in our home of Knox County," says Ted.

The fact Ann and Ted have somewhat different philanthropic interests highlights yet another advantage of donor advised funds: flexibility. Ann explains, "Ted and I balance each other very well in our charitable interests. I am focused on supporting programs that change people's lives, that take them from a place that may be very painful and move them to a different place. Organizations like Interchurch and New Directions come to mind as the kind that have the ability to change people's lives for the better."

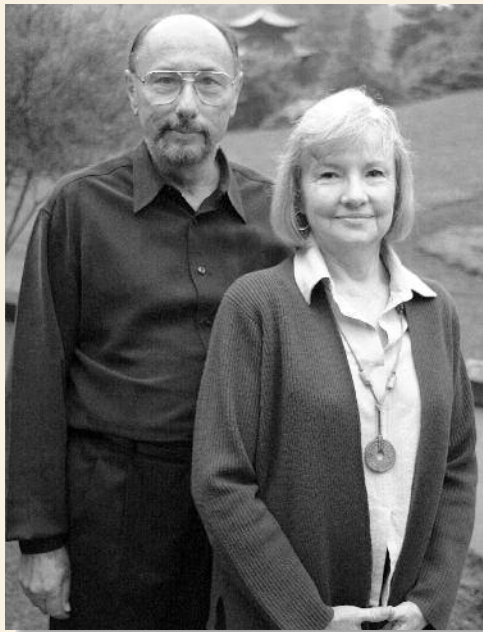
Ted, on the other hand, says, "I prefer not to give money that will be consumed by operations, and expect most charitable organizations are geared

up to raise their operating money from the community or other sources. I prefer to provide seed money for pilot projects or capital improvement. Ann and I are a good match and, fortunately, the Schnormeier Family Fund has always generated enough income to allow us each to meet our charitable goals."

Directing gifts to one's favorite charity is as simple as

writing a letter to the Community Foundation requesting the board to authorize a distribution. Generally, recommendations and distributions are made on an annual basis; however, more frequent distributions are possible, if need be.

"We're delighted to talk about our good experience with the Community Foundation, because we believe as people come to understand the benefits, more donor-advised funds will be established. The obvious benefit to establishing a fund, rather than giving an organization a large gift of principal, is that rather than principal being exhausted, income will be provided annually for many organizations into the future. It allows that principal to continue to work for the community."



*Ted and Anne Schnormeier*

**A** donor-advised fund can be established with an initial gift of \$5,000 or more in cash, securities, or other marketable assets, and can be supplemented with additional contributions at any time. Using a brief form provided by the Foundation, donors specify: whether income only, or income and principal, may be distributed to charities; who is authorized to make recommendations; and what restrictions, if any, will be placed on selecting organizations eligible to receive distributions from the fund. Tax advantages, to the full extent allowable by law, are realized by donors at the time contributions are made to the Foundation.

For information on establishing a donor-advised fund, or to review a sample document used to establish a donor-advised fund, contact: Sam Barone, Executive Director, Community Foundation of Mount Vernon & Knox County, One South Main St., P.O. Box 1270, Mount Vernon, OH 43050; phone: (740) 392-3270; email: [thefoundation@first-knox.com](mailto:thefoundation@first-knox.com). ■

## SCHOLARSHIP FUNDS

### FUND BALANCES, GRANTS AND CONTRIBUTIONS

Scholarship funds have been designated by donors to assist Knox County residents in achieving their educational goals. While some funds benefit students from specific high schools, or those pursuing particular careers, many provide general assistance with higher education expenses. Combined with grants from the Community Foundation's unrestricted fund, the funds listed below provided \$187,667 in scholarships in 2002. (See page 20 for a list of 2002 recipients.)

ARCK/CROWTHERS FUND	\$4,388
ROBERT C. APPLETON SCHOLARSHIP FUND	\$123,121
2002 scholarships	\$4,000
CLARK & LUCY BIGGS SCHOLARSHIP FUND	\$245,955
2002 scholarships	\$9,000
CHARLES E. CASSADAY SCHOLARSHIP FUND	\$4,050
HELEN HOPE COOKE SCHOLARSHIP FUND	\$674,815
2002 scholarships	\$21,500
NORMA J. CORNELL MEMORIAL FUND	\$259,692
Contributions to the fund in 2002	\$232,500
NORMA J. CORNELL MEMORIAL ST. VINCENT DEPAUL EDUCATION FUND	\$260,698
Contributions to the fund in 2002	\$232,500
HAROLD B. "COOKIE" CUNNINGHAM FUND	\$10,429
2002 scholarships	\$500
FREDERICKTOWN ACADEMIC LOAN FUND	\$7,953
RALPH & ARA FLACK SCHOLARSHIP FUND	\$24,793
2002 scholarships	\$750
PAULINE B. FREEMAN SCHOLARSHIP FUND	\$890,014
2002 scholarships	\$27,500

WILBUR F. GAUNDER ENGINEERING SCHOLARSHIP FUND	\$1,195,983
2002 scholarships	\$30,000
WILBUR F. GAUNDER NURSING SCHOLARSHIP FUND	\$113,096
LARRY HALL SCHOLARSHIP FUND	\$2,763
DONALD & SIGRID HARNSBERGER SCHOLARSHIP FUND	\$49,301
Contributions to the fund in 2002	\$7,350
BRICE HESS MEMORIAL SCHOLARSHIP FUND	\$1,100
Contributions to the fund in 2002	\$1,100
LILLIAN C. HICKMAN SCHOLARSHIP FUND	\$401,936
2002 scholarships	\$20,000
Contributions to the fund in 2002	\$50
CHARLES F. & ZELLA HORN-SIMPSON MEMORIAL SCHOLARSHIP FUND	\$43,914
2002 scholarships	\$1,500
WILLIAM S. HUNTER SCHOLARSHIP FUND	\$16,218
2002 scholarships	\$500
ETHEL JAMISON SCHOLARSHIP FUND	\$7,459
IDA KOHL SCHOLARSHIP FUND	\$6,576
REX M. JR. & BARBARA C. LAMB SCHOLARSHIP FUND	\$54,274
2002 scholarships	\$2,000
HARRIETT B. LAWLER SCHOLARSHIP FUND	\$83,768
2002 scholarships	\$3,000
JOHN LEE MEMORIAL SCHOLARSHIP FUND	\$10,099
Contributions to the fund in 2002	\$10,000
ROBERT & EVELYN LEE SCHOLARSHIP FUND	\$8,662
2002 scholarships	\$2,500
LEEDY FAMILY FUND	\$3,083
Contributions to the fund in 2002	\$3,000
ALEXANDRA LETZ SCHOLARSHIP FUND	\$26,766
2002 scholarships	\$1,000



ALEXANDRA LETZ NURSING SCHOLARSHIP FUND	\$38,468
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KATHRYN ANN LEVERING MEMORIAL SCHOLARSHIP FUND	\$15,945
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2002 scholarships	\$500
<i>Contributions to the fund in 2002</i>	\$340

RALPH V. & ANNA B. MOWERY SCHOLARSHIP FUND	\$51,768
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2002 scholarships	\$1,500
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EDNA OSBORN SCHOLARSHIP FUND	\$1,303
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ARTHUR J. PACKARD JR. MEMORIAL FUND	\$21,522
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RICHARD POLING SCHOLARSHIP FUND	\$67,221
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2002 scholarships	\$2,000
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WILLIAM E. & HELEN F. POND SCHOLARSHIP FUND	\$11,674
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2002 scholarships	\$500
<i>Contributions to the fund in 2002</i>	\$250

SARAH K. PRESSLER MEMORIAL SCHOLARSHIP FUND	\$7,821
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<i>Contributions to the fund in 2002</i>	\$7,800
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DR. CLYDE L. & DORA L PURDY SCHOLARSHIP FUND	\$16,280
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2002 scholarships	\$750
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J. R. & LORENE PURDY SCHOLARSHIP FUND	\$925,256
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2002 scholarships	\$10,500
<i>Contributions to the fund in 2002</i>	\$141,102

CHARLES PURSEL SCHOLARSHIP FUND	\$4,392
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2002 scholarships	\$500
<i>Contributions to the fund in 2002</i>	\$25

RICK L. SCOTT MEMORIAL SCHOLARSHIP FUND	\$47,949
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2002 scholarships	\$2,000
<i>Contributions to the fund in 2002</i>	\$1,000

LARRY SCHISLER MEMORIAL SCHOLARSHIP FUND	\$15,751
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<i>Contributions to the fund in 2002</i>	15,610
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SIMS-ROSE SCHOLARSHIP FUND	\$5,049
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<i>Contributions to the fund in 2002</i>	\$5,000
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RICHARD & REGINA SMYTHE SCHOLARSHIP FUND	\$2,677
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DEAN & AUDREY SPEARMAN "ROLLIN' BUCKEYE" SCHOLARSHIP FUND	\$75,002
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2002 scholarships	\$4,000
<i>Contributions to the fund in 2002</i>	\$25,000

STRANG FAMILY SCHOLARSHIP FUND	\$22,687
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2002 scholarships	\$1,000
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STUDENT SCHOLARSHIP FUND	\$456
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WILLIAM & JENNIE JOHNSON SCHOLARSHIP FUND	\$331
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JAY M. & SARAH L. WILSON O.S.U. SCHOLARSHIPS FUND	\$41,499
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<i>Contributions to the fund in 2002</i>	25,580
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WILLIAM E. WING MUSIC SCHOLARSHIP FUND	\$15,458
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2002 scholarships	\$500
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CHARLES M. ZELKOWITZ COMMUNITY SERVICE SCHOLARSHIP FUND	\$33,617
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2002 scholarships	\$1,000
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CHARLES & HELEN ZELKOWITZ SCHOLARSHIP FUND	\$33,605
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2002 scholarships	\$1,000
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STEPHEN W. ZELKOWITZ ETHICS SCHOLARSHIP FUND	\$34,111
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2002 scholarships	\$1,000
<i>Contributions to the fund in 2002</i>	\$500

#### SCHOLARSHIP FUNDS SUMMARY

GRANTS DISTRIBUTED*	\$187,667
CONTRIBUTIONS TO THE FUNDS	\$708,707
BALANCE OF SCHOLARSHIP FUNDS	\$6,020,749

\* Total reflects \$40,000 distributed from Unrestricted Fund for scholarships, and refunds of \$4,833 for unused scholarship grants.

## SCHOLARSHIP RECIPIENTS

NAME, SCHOLARSHIP AMOUNT, SCHOLARSHIP FUND, COLLEGE SELECTION

*Scholarships in 2002 were funded with income from designated scholarship endowments and with a \$40,000 contribution from unrestricted funds. The Foundation enjoys receiving college news and photos from recipients, such as those printed in this section of the annual report.*

**Jamie L. Addis**, \$1,000, General Fund, University of Pittsburgh.

**Bethany J. Andrzejewski**, \$1,000, Helen H. Cooke Fund and \$1,000, Charles M. Zelkowitz Community Service Award, Wright State University.

**Seth M. Andrzejewski**, \$10,000, Wilbur F. Gaunder Fund and \$1,000, Helen H. Cooke Fund, The Ohio State University.

**Julie M. Arnold**, \$1,000, Robert C. Appleton Fund and \$1,000, Nursing Scholarship Funds, Olivet Nazarene University.

**Cathy A. Auker**, \$2,000, Richard Poling Fund, Mount Vernon Nazarene University.

**Katharine F. Baker**, \$1,000, Clark and Lucy Biggs Fund, Amherst College.

**Andre C. Ballard**, \$1,000, General Fund, The Ohio State University-Agricultural Institute.

**Chadwick E. Barnes**, \$1,000, Helen H. Cooke Fund, Northeastern Ohio Universities College of Medicine.

**Kassandra L. Beachy**, \$1,000, Pauline B. Freeman Fund, Cedarville University.

**Laura E. Beatty**, \$1,000, Stephen W. Zelkowitz Ethics Fund, University of Rio Grande.

**Amy R. Beavin**, \$1,000, General Fund, St. Olaf College.

**Rebecca J. Betts**, \$1,000, Pauline B. Freeman Fund, OSU-Newark.

**Molly A. Blair**, \$1,000, Pauline B. Freeman Fund and \$750, Ralph And Ara Flack Fund, Hocking College.

**Ashley M. Blanchard**, \$1,000, Pauline B. Freeman Fund, Central Ohio Technical College.

**Amy K. Bodart**, \$1,000, General Fund, St. Olaf College.

**Thomas W. Bodart**, \$1,000, Harriett B. Lawler Fund, University of Notre Dame.

**Carrie A. Boeshart**, \$375, Dr. Clyde L. and Dora L. Purdy Fund, The Ohio State University.

**Sarah I. Boone**, \$1,000, Helen H. Cooke Fund, The Ohio State University.

**Casey R. Braddock**, \$5,000, Lillian Hickman

Medical Scholarship, Wright State University School of Medicine.

**Christopher J. Braddock**, \$1,000, Helen H. Cooke Fund, University of Dayton.

**Joshua A. Brandenburg**, \$1,000, Clark and Lucy Biggs Fund, Hope College.

**Joseph P. Bratton**, \$1,500, Dean and Audrey Spearman Fund, The Ohio State University.

**Marie B. Bratton**, \$1,000, Pauline B. Freeman Fund, Walsh University.

**Renee C. Brenneman**, \$1,000, Leedy Family Fund, Ohio University.

**Karl W. Brown**, \$1,000, Helen H. Cooke Fund, Cornell University.

**Britney S. Buckingham**, \$1,000, Nursing Scholarship Funds, Hocking College.

**Garrett A. Bunnell**, \$1,000, Helen H. Cooke Fund, The Ohio State University.

**Jennifer J. Burch**, \$1,000, General Fund, Bowling Green State University.

**Weylin R. Burgett**, \$1,000, General Fund, Mount Vernon Nazarene University.

**Christopher P. Campbell**, \$1,000, Pauline B. Freeman Fund, Bowling Green State University.



Scholarship recipient Kristy Frank, a University of Cincinnati athletic training major, watches intently as her Bearcats compete against the University of Hawaii.



**Suzanne K. Campbell**, \$1,000, Pauline B. Freeman Fund, Otterbein College.

**Jami R. Canning**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Carissa D. Carpenter**, \$500, William E. Wing, Cincinnati Bible College.

**Laine A. Carpenter**, \$1,000, Nursing Scholarship Funds, Kent State University.

**Sarah E. Carter**, \$1,000, General Fund, Indiana Wesleyan University.

**Shu-Fu Chen**, \$1,000, Robert C. Appleton Fund, University of Michigan.

**Nathan L. Clark**, \$1,000, General Fund, Taylor University.

**Lindsay M. Clouston**, \$1,000, Pauline B. Freeman Fund, Taylor University.

**Timothy E. Clutter**, \$1,000, Rick L. Scott Memorial Fund, The Ohio State University-Agricultural Institute.

**Amanda J. Cochran**, \$1,000, Helen H. Cooke Fund, The University of Toledo.

**Stephanie M. Cochran**, \$1,000, General Fund, Walsh University.

**Shawn R. Coffield**, \$1,000, Pauline B. Freeman Fund, Ashland University.

**Bryan N. Coffing**, \$5,000, Lillian Hickman Medical Scholarship, Dartmouth Medical School.

**Sebastian A. Coleman**, \$1,000, Rex M., Jr. and Barbara C. Lamb Fund, College of Wooster.

**David C. Colopy**, \$1,000, Pauline B. Freeman Fund, Capital University.

**Cassandra L. Craig**, \$1,000, General Fund, The Ohio State University-Newark.

**Barbara J. Day**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Brandi J. Dennis**, \$1,000, General Fund, The Ohio State University.

**Jefferson J. Derr**, \$500, Harold B. "Cookie" Cunningham, Mount Vernon Nazarene University.

**Kerry T. Durbin**, \$1,000, Robert C. Appleton Fund, The Ohio State University-Newark.

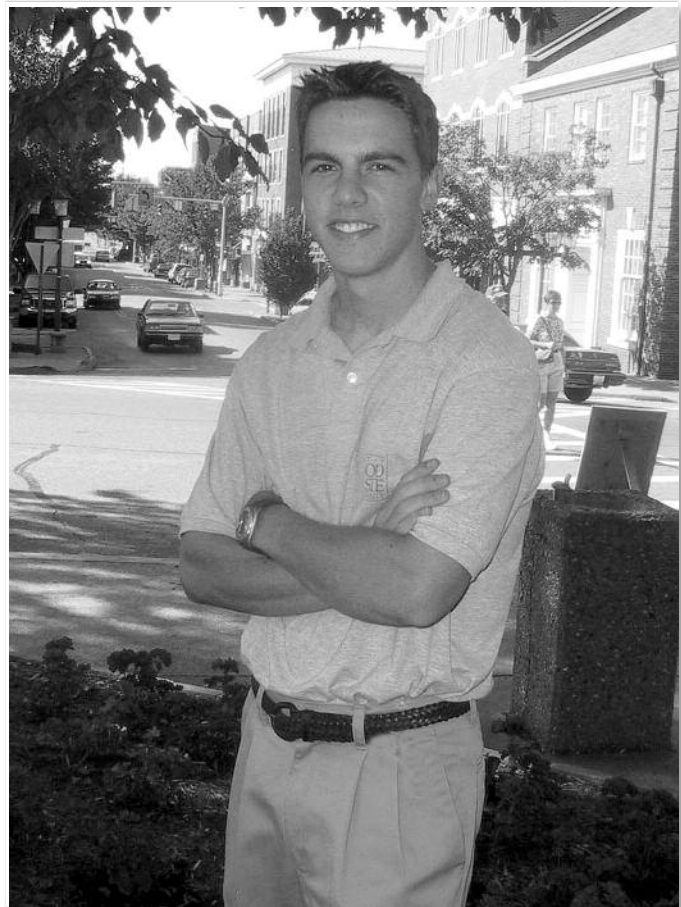
**Monica L. Durbin**, \$1,000, Pauline B. Freeman Fund, Hiram College.

**Ryan S. Fabrizio**, \$1,000, Charles and Helen Zerkowitz, Devry Institute of Technology.

**Hans M. Farmer**, \$1,000, General Fund, University of Cincinnati.

**William A. Farnham**, \$1,000, General Fund, Hillsdale College.

**Steven A. Fenigstein**, \$1,000, General Fund, Grinnell College.



*Seth Andrzejewski used his \$10,000 Wilbur Gaunder Scholarship to pursue engineering studies at Ohio State.*

**Annie K. Fiecoat**, \$1,000, Nursing Scholarship Funds, Central Ohio Technical College.

**Katie A. Frank**, \$1,000, Helen H. Cooke Fund, Wright State University.

**Kristy A. Frank**, \$1,500, Helen H. Cooke Fund, University of Cincinnati.

**Amber K. Geiger**, \$1,000, Nursing Scholarship Funds, Central Ohio Technical College.

**Julia E. Geiger**, \$1,000, Clark and Lucy Biggs Fund, Ohio Wesleyan University.

**Heather E. Green**, \$1,000, Helen H. Cooke Fund and \$1,000, General Fund, Northeastern University.

**Jessica M. Grennell**, \$1,000, Pauline B. Freeman Fund, Mount Vernon Nazarene University.

**Joshua T. Grimm**, \$1,000, Helen H. Cooke Fund, Otterbein College.

**Brent M. Hall**, \$1,000, Clark And Lucy Biggs Fund, Point Loma Nazarene University.

**Sarah E. Hanna**, \$500, Pauline B. Freeman Fund, University of Rio Grande.

**Matthew R. Hannan**, \$1,000, Helen H. Cooke Fund, The University of Toledo.

**Angela M. Hardesty**, \$1,000, Pauline B. Freeman Fund, Marietta College.

**Glynnis M. Hausman**, \$1,000, Strang Family Scholarship Fund, Hunter College.

**Kathleen M. Highnam**, \$1,000, Rick L. Scott Memorial Fund, Ashland University.

**Justin P. Hillier**, \$1,000, General Fund, Wittenberg University.

**Melanie J. Houston**, \$500, Pauline B. Freeman Fund, Denison University; \$500, Pauline B. Freeman Fund, School For International Training.

**Paul M. Hughes**, \$1,000, Rex M., Jr. and Barbara C. Lamb Fund, Muskingum College.

**Jennifer L. Ice**, \$1,000, Leedy Family Fund, The University of Toledo.

**Scott E. Imboden**, \$1,000, General Fund, The Ohio State University.

**Courtney L. James**, \$1,000, General Fund, Mount Vernon Nazarene University.

**Colleen M. Janczak**, \$1,000, General Fund, College of Wooster.

**William A. Jenkins**, \$5,000, Lillian Hickman Medical Scholarship, University of Cincinnati College of Medicine.

**Tabitha C. Judson**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Hanna M. Kadlec**, \$1,000, General Fund, Asbury College.

**Laura J. Knight**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Bradley E. Kohl**, \$1,000, Harriett B. Lawler Fund, Wilmington College.

**Eric D. Koppert**, \$1,000, Clark and Lucy Biggs Fund, College of Wooster.

**Bethany J. Lamb**, \$1,000, Pauline B. Freeman Fund, Mount Vernon Nazarene University.

**Shannon L. Lampley**, \$1,000, Pauline B. Freeman Fund, Ashland University.

**Daniel R. Landis**, \$1,000, General Fund, Butler University.

**Elizabeth C. Laudeman**, \$1,000, General Fund, Smith College.

**Rachel L. Lawless**, \$1,000, General Fund, Denison University.

**Carrie E. Levering**, \$1,000, Helen H. Cooke Fund, The Ohio State University.

**Candace R. Lifer**, \$1,000, Helen H. Cooke Fund, The Ohio State University.

**Melissa A. Littleton**, \$1,500, Dean and Audrey Spearman Fund, The Ohio State University-Newark.

**Melissa E. Mann**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Megan M. Maurer**, \$1,000, General Fund, Point Loma Nazarene University.

**David R. McCollough**, \$1,000, General Fund, Ohio University.

**Alista R. McDonald**, \$750, Ralph V. and Anna B. Mowery Fund, Bowling Green State University.

**Cheryl A. McLaughlin**, \$1,000, Clark and Lucy Biggs Fund, University of Dayton.

**Darrin J. Meyer**, \$1,000, Pauline B. Freeman Fund, The University of Toledo.

**Diana J. Mickley**, \$1,000, Harriett B. Lawler Fund, The Ohio State University.

**Nickolas L. Miller**, \$1,000, Robert C. Appleton Fund, Mount Vernon Nazarene College.

**Bradley R. Moore**, \$1,000, Clark and Lucy Biggs Fund, Bluffton College.

**Sarah J. Moreland**, \$1,000, General Fund, Mount Vernon Nazarene University.



During a month-long St. Olaf College class in Russia, scholarship recipient Amy Beavin found out "Lord of the Rings" was also a box-office sensation in St. Petersburg.



**Michelle E. Mosher**, \$1,000, General Fund, Houghton College.

**Lindsey R. Myers**, \$375, Dr. Clyde L. and Dora L. Purdy Fund, The Ohio State University.

**Jodi L. Naylor**, \$1,000, General Fund, Heidelberg College.

**Sarah J. Neighbarger**, \$1,000, Helen H. Cooke Fund, The University of Toledo.

**Austin J. Nixon**, \$1,000, General Fund, Ohio University.

**Stephanie L. O'Donnell**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Stephanie N. Olson**, \$1,000, Pauline B. Freeman Fund, Wright State University.

**Krista M. Pappas**, \$1,000, Pauline B. Freeman Fund, The Ohio State University-Newark.

**Angela N. Parker**, \$1,000, Leedy Family Fund, Grove City College.

**Paras S. Patel**, \$5,000, Lillian Hickman Medical Scholarship, Northeastern Ohio Universities College of Medicine.

**Ritesh S. Patel**, \$2,500, Robert and Evelyn Lee Fund, University Of Akron.

**Kristin R. Payne**, \$1,000, Pauline B. Freeman Fund, Mount Vernon Nazarene University.

**Rebecca L. Payne**, \$1,000, Pauline B. Freeman Fund, Youngtown State University.

**Nicholas A. Pecsok**, \$1,000, Helen H. Cooke Fund, Maryland Institute College of Art.

**Amy J. Perkins**, \$1,000, Nursing Scholarship Funds, North Central State College.

**Brett W. Porter**, \$1,000, General Fund, The Ohio State University-Mansfield.

**Angela E. Pursel**, \$500, Charles Pursel Fund, Mount Vernon Nazarene University.

**Bonnie L. Rice**, \$1,000, General Fund, Baldwin Wallace College.

**Monica A. Rice**, \$1,000, Pauline B. Freeman Fund, Ohio University.

**Melissa L. Rieman**, \$1,000, Clark and Lucy Biggs Fund, The University of Toledo.

**John E. Robinson**, \$1,000, Helen H. Cooke Fund, Devry Institute of Technology.

**Joshua R. Schonauer**, \$1,000, General Fund, New York University.

**Andrea N. Scott**, \$500, William S. Hunter Fund, Bowling Green State University.

**Megan E. Sheasby**, \$1,000, Charles and Zella Horn-Simpson, Kenyon College.

**Michael D. Simmons**, \$750, Ralph V. and Anna B. Mowery Fund, Ohio University.

**Audrey R. Smith**, \$1,000, Alexandra Letz General, Mount Vernon Nazarene University.

**Jacquelyn N. Smith**, \$1,000, Frederick N. Lorey Journalism Scholarship, Otterbein College.

**Jonathon M. Smith**, \$1,000, General Fund, Wilmington College.

**Stacy L. Smith**, \$750, Pauline B. Freeman Fund, The Ohio State University.

**Adonyah Y. Spears**, \$1,000, Nursing Scholarship Funds, Central Ohio Technical College.

**Ashley L. Staats**, \$1,000, General Fund, Bowling Green State University.

**Keri A. Streby**, \$1,000, Helen H. Cooke Fund; and \$500, Kathryn Ann Levering Memorial Fund, University of Akron.

**Ben M. Swarts**, \$1,000, Pauline B. Freeman Fund, College of Wooster.

**Gabriel P. Swarts**, \$1,000, Pauline B. Freeman Fund, Baldwin Wallace College.

**Vincent D. Swartzentruber**, \$1,000, Helen H. Cooke Fund, Ashland University.

**Andrew S. Thompson**, \$500, William E. and Helen F. Pond Fund, Mount Vernon Nazarene University.

**Rachel S. Thrift**, \$1,000, General Fund, Lee University.

**Sarah Tomita**, \$1,000, General Fund, Yale University.

**Monica D. Van Scyoc**, \$1,000, Pauline B. Freeman Fund, Mount Vernon Nazarene University.

**Zachary T. Vance**, \$1,000, Clark and Lucy Biggs Fund, The Ohio State University.

**Lisa E. Waddell**, \$500, Nursing Scholarship Funds, Knox County Career Center.

**Miriam E. Wagner**, \$1,000, Frederick N. Lorey Journalism Scholarship, Indiana Wesleyan University.

**Rebecca A. Wagner**, \$1,000, Helen H. Cooke Fund; \$1,000, General Fund, Indiana Wesleyan University.

**Sarah B. Warren**, \$20,000, Wilbur F. Gaunder Fund, Case Western Reserve University.

**John J. Wells**, \$500, Pauline B. Freeman Fund, Denison University.

**John J. Wells**, \$500, Charles and Zella Horn-Simpson Fund, Denison University.

**Travis H. White**, \$1,000, General Fund, The Ohio State University-Mansfield.

**Rebecca A. Workman**, \$750, Pauline B. Freeman Fund, Malone College. ■

# 2002 CONTRIBUTORS TO THE FOUNDATION

## A

Daniel and Kris Almendinger  
Ariel Corporation

## B

Arlene Baker  
Samuel and Paula Barone  
Ann Beckholt  
Roselyn Beery  
Joseph and Nancy Bell  
Susan Bell  
Eric and Miriam Bogard  
Charles Brown

James and Maureen Buchwald

## C

Bernerd and Susan Campbell  
Capital Securities of America  
Inc.  
Carbar Inc.  
Chelsea Carpenter  
Alan and Traci Cassel  
The COGENESIS Group  
Richard and Janice Compton  
Janice M. Compton  
John and Ann Conroy  
Audrey Cornelius

Norma Cornell Estate  
Stewart and Cleo Corry  
Robert and Mary Crumm

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Harvey Dulin

## E

Robert and Betty Earl  
Grace Ellis

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Geraldine Moore Fowler  
Estate  
Ronald Fox

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Ron Godfrey Insurance  
Ruth Griffing

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Donald and Sigrid  
Harnsberger  
William and Carolyn Hart  
Sondra Hess  
Grace Hoagland  
John and Cheryl Hoffman  
Deborah Hoyt

## J

Robert and Alexandra  
Jackman  
Margaret Jamison Estate

## K

John and Dorothy Kaglic

## L

Carol Lee  
Russell Leedy  
Ruth Leedy  
Teri Leonard  
Bruce Levering  
Kenneth and Suzanne Levering  
Elizabeth Lutwick



## PHILANTHROPY BY DESIGN

Certainly the most creative gift (literally) received by the Community Foundation in 2002 was that of our new logo and stationery design. Carol Mason Rubenstein and Micah Rubenstein of The COGENESIS Group, a Mount Vernon business development and strategic marketing firm, contributed their time and talents, resulting in a fresh look to complement the Foundation's new name and organizational structure.



## M

John and Amy Macionis  
Mack Painting  
Madcap Memorial Fund  
Mary McManus  
Dolores Melvin  
James Metcalf  
David and Sharon Mills  
June Misconin  
Jack and Iris Moran  
Jeff and Christina Mullin  
Richard and Susan Murray

## N

Joseph and Sally Nelson  
Deborah Nutt

## O

Ohio's Junior Miss, Inc.

## P

L. Keith Plocki  
David and Marci Pressler  
Progressive Communications  
J. R. Purdy Trust

## R

Mark Ramser  
Robert and Penelope Rauzi  
Frederick and Deborah  
Reeder  
Lise' and Michael Rendina  
John Risko  
Robert and Patricia Ronk  
Kim and Pamela Rose

## S

Anna Salisbury Trust  
Kurt and Sandra Schisler  
Ronald Schisler  
Theodore and Ann  
Schnormeier  
Randy Schwalm  
Robert and Thelma Shaffer  
Jeffrey and Melanie Small  
Small's Sand & Gravel Inc.  
Galen and Gay Smith  
Linda Smith  
Dean and Audrey Spearman  
Paul Spurgeon  
M. Jacqueline Stichert

## T

Perry and Louise Trinkner  
Glen and Gretchen Turney

## U

United Way of Knox County

## V

Joseph and Tami Vaughn

## W

Bonita Warren

Ian and Charlotte Watson  
Don White  
Frank and Frances Wilson  
Jay Wilson  
Wilbur Wiseman  
Wilbur Wiseman Jr.  
Curt and Sandy Wright

## Z

Donna Zelkowitz



## LEAVE A LEGACY®

**L**eave a Legacy is a community-based program to help people learn about giving through a will or from an estate. Through its affiliation with the Central Ohio Planned Giving Council and the National Committee on Planned Giving, the Community Foundation of Mount Vernon & Knox County is committed to providing helpful information about creating a lasting legacy.

More than likely, you are an individual who has made a practice of enhancing our community with regular charitable contributions. That support can continue in perpetuity as a memorial to you and your family through a planned gift with the Community Foundation of Mount Vernon & Knox County.

Whether it be a traditional bequest or a charitable gift that provides you with an income stream and tax benefits during your lifetime, we invite you to explore the endless possibilities for philanthropy within the Foundation.

This publication celebrates many community-based organizations and area students who have benefitted from the foresight of past generations. The cultural, educational and humanitarian future of Knox County depends in large part on the legacies we will create in our lifetimes.

Consider leaving your legacy to the community through a gift to the Community Foundation, as so many others have since 1944.

MEMBER  
National  
Committee  
on Planned  
Giving®



**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  
M. JACQUELINE STICHERT, CPA  
JANICE M. COMPTON, CPA

LARRY A. SCHISLER, CPA 1938 - 2002

INDEPENDENT AUDITORS' REPORT

The Mount Vernon Community Trust/  
The Community Foundation of Mount Vernon and Knox County  
Mount Vernon, Ohio 43050

We have audited the accompanying statement of investments of The Mount Vernon Community Trust and The Community Foundation of Mount Vernon and Knox County as of December 31, 2002 and 2001 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 and The Community Foundation of Mount Vernon and Knox County as of December 31, 2002 and 2001 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.

*Dennis & Schisler, Inc.*

Mount Vernon, Ohio  
April 21, 2003

MEMBERS  
American Institute of Certified Public Accountants  
Ohio Society of Certified Public Accountants  
[www.dennisandschisler.com](http://www.dennisandschisler.com)



# FINANCIAL STATEMENTS

*The Condensed Report of Condition as of December 31, 2002; taken from  
Report of Examination by Dennis & Schisler, Inc. CPA.*

## PRINCIPAL AND RECEIPTS

Beginning balance (December 31, 2001)	\$20,415,197
Income	866,693
Realized gains (losses)	(36,063)
Contributions	1,455,445
<b>Beginning balance plus receipts</b>	<b>\$22,701,272</b>

## DISBURSEMENTS

Grants from unrestricted funds	\$230,122
Grants from designated funds	256,992
Scholarship grants	187,667
Grants from donor-advised funds	95,606
Expenses of the Foundation	204,523
Total disbursements	974,910
<b>Ending fund balance (December 31, 2002)</b>	<b>\$21,726,362</b>

## EXPENSES OF THE FOUNDATION

First-Knox National Bank	
Administration fee	19,150
Investment advisory fee	140,112
Salary and benefits	18,369
Other expenses	26,892
<b>Total expenses</b>	<b>\$204,523</b>

## TOTAL GRANTS

2002	\$ 777,387
2001	\$ 732,571
2000	\$ 803,176
1999	\$ 607,479
1998	\$ 654,193

## TOTAL ASSETS

2002	\$ 21,726,362
2001	\$ 20,415,197
2000	\$ 19,074,125
1999	\$ 16,018,902
1998	\$ 14,724,527

## “Guidelines for Grantmaking” adopted in 2002

For more than a half-century the Community Foundation of Mount Vernon & Knox County, known formerly as the Mount Vernon/Knox County Community Trust, has awarded grants and scholarships from a variety of unrestricted, donor-advised and designated funds. As a group, these awards reflect the diversity of charitable interests defined in the Foundation’s mission statement:

- To improve the quality of life in Mount Vernon and Knox County through charitable giving;
- To provide a vehicle for donors of varied interests to support charitable and community activities;
- To assess and respond 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
- To develop a permanent endowment for the community, and to serve as a catalyst for the initiation of vital projects.

The trustees of the Community Foundation of Mount Vernon & Knox County are committed to identifying and initiating projects that fulfill this mission, and invite funding proposals from Knox County organizations that share their vision. Grant-seekers typically apply to the Foundation for financial support from its unrestricted funds, which are distributed based on availability, and upon a proposal’s merits, as measured against the following criteria: Eligibility, Foundation Priorities and Coordination of Funding. Each of these criteria is discussed in detail below.

All requests for funding must receive majority approval at a Foundation board meeting in which a quorum is present. All grant applications are considered by the Foundation board at regularly scheduled meetings in the months of February, April, June, August, October and December. Applicants should be aware grants are awarded on a competitive basis, and that deadlines for submission of requests must be strictly observed.

To expedite the consideration of Small Grant requests, and to provide adequate time for the review of Major Grant requests, two distinct applications procedures have been established by the Foundation:

A Small Grant application (up to \$3,000)

should be received by the Foundation before the first day of the month in which it is to be considered (See chart below). The Small Grant application consists of a two-page form, to which one or two pages of supporting documentation may be appended (See “How to Apply” below).

A Major Grant application (more than \$3,000) should be received by the first day of the month prior to the month in which it is to be considered (See chart below). The application for a Major Grant consists of a two-page form, and various required exhibits (See “How to Apply” below). The Foundation advises organizations applying for funding of \$25,000 or more to do so as early as possible in the calendar year, preferably by January 1, for consideration at the February board meeting.

Applicants for both Small Grants and Major Grants will be informed of the Foundation’s decision by the final day of the month in which a grant is considered (See chart below)

### GRANT APPLICATION CALENDAR

Small Grant Application Deadline	Major Grant Application Deadline	Reviewed by Community Foundation in	Notification of Foundation Decision by
Jan. 31	Jan. 1	February	Feb. 28
Mar. 31	Mar. 1	April	Apr. 30
May 31	May 1	June	Jun. 30
Jul. 31	Jul. 1	August	Aug. 31
Sep. 30	Sep. 1	October	Oct. 31
Nov. 30	Nov. 1	December	Dec. 31

### CRITERIA

**Eligibility.** Most grants are made to tax-exempt, private agencies classified as 501 (c) (3) organizations, and to public charities as defined by the U.S. Internal Revenue Service. Public schools, governmental entities and Knox County colleges and universities are also eligible to apply for Foundation grants. Prospective applicants are urged to contact the Foundation before preparing an application if there is a question concerning eligibility.

Certain projects and organizations are not eligible for funding, including but not limited to:

- Grants to individuals
- Endowment campaigns
- Ongoing operating expenses
- Religious organizations (for religious purposes)
- Purchase of computers or other equipment (that is not part of a broader project)

- Existing obligations, debts or liabilities.
- Police and fire protection
- Staff positions for government agencies
- Travel (when it is the proposal's primary focus)
- Organizations that do not operate programs in Knox County, or for the benefit of Knox County residents
- Political campaigns.

**F**oundation Priorities. The Foundation seeks to maximize its impact in the community and has adopted the following strategic priorities to guide its grant-making. Proposals that address one or more of these priorities have a greater likelihood of success. They are listed here in no particular order of importance:

- A pilot project which can serve as a model of excellence in the community
- A project which proposes a creative solution to an identified, but unmet, need in the community
- A project or program which encourages volunteer involvement
- A project that is a collaborative effort among non-profit organizations in the community and will eliminate duplication of services
- A project which is likely to make a clear difference in the quality of life for a substantial number of people
- A project which promotes economic vitality in the community.

**Coordination of Funding.** The Foundation prefers to support projects in which it is a funding partner, rather than the sole funding source. Applicants are strongly urged to include some degree of match funding in their proposal, and in most cases Foundation grants should be the final dollars committed to a project. An additional factor in considering an award is an organization's demonstrated ability to sustain the project, if applicable, when Foundation funding has ended.

### ADDITIONAL INFORMATION

While the Foundation's board of directors does not establish specific distribution quotas, either by geography, project type, or any other criterion, it makes every attempt possible to fund a broad spectrum of needs throughout Knox County.

Incomplete grant proposals are not eligible for consideration, and will be returned to applicants. The Foundation may on occasion request an applicant to submit an addendum, addressing specific questions, prior to its making a final determination.

An applicant for a grant of \$25,000 or more may be invited to personally present the proposal

to members of the distribution committee and/or the entire board of directors. Presentations are usually limited to 15 minutes, including time reserved for questions from Foundation members.

The Foundation board of directors does not issue statements of explanation for applications it is unable to fund. Unsuccessful applicants, who plan to submit a similar request for funds at a later date, are urged to discuss the Foundation's application requirements and funding priorities with the executive director prior to re-submission.

Contributions and bequests to the Foundation are often the result of publicity concerning a funded project. Therefore, the Foundation requires all grantees to appropriately acknowledge its financial support in news releases, internal publications, announcements, and, where appropriate, on building plaques, equipment and other capital items.

The Foundation has both a fiduciary and a community responsibility to prudently manage resources that have been entrusted to it. Grantees share in this responsibility and are required to submit the Project Completion Certification provided by the Foundation, as well as annual progress reports for multi-year projects.

Unutilized grant funds may not be used for unbudgeted purposes, and must be returned to the Foundation for re-distribution.

### HOW TO APPLY

An application form for either a Small Grant or a Major Grant may be obtained in person or by mail from the Community Foundation of Mount Vernon & Knox County office, located on the first floor of the First-Knox National Bank Main Office, One South Main Street, P.O. Box 1270, Mount Vernon, OH 43050. Applications may also be requested by telephone: (740) 392-3270; by fax: (740) 399-5296; or by e-mail: [thefoundation@firstknox.com](mailto:thefoundation@firstknox.com). At this time the Foundation accepts only hardcopy grant applications, however, the application form itself is available in Microsoft Word format (Windows and Macintosh compatible), and upon request will be provided by return e-mail. Applications received after the published deadlines will be considered at the next scheduled meeting.

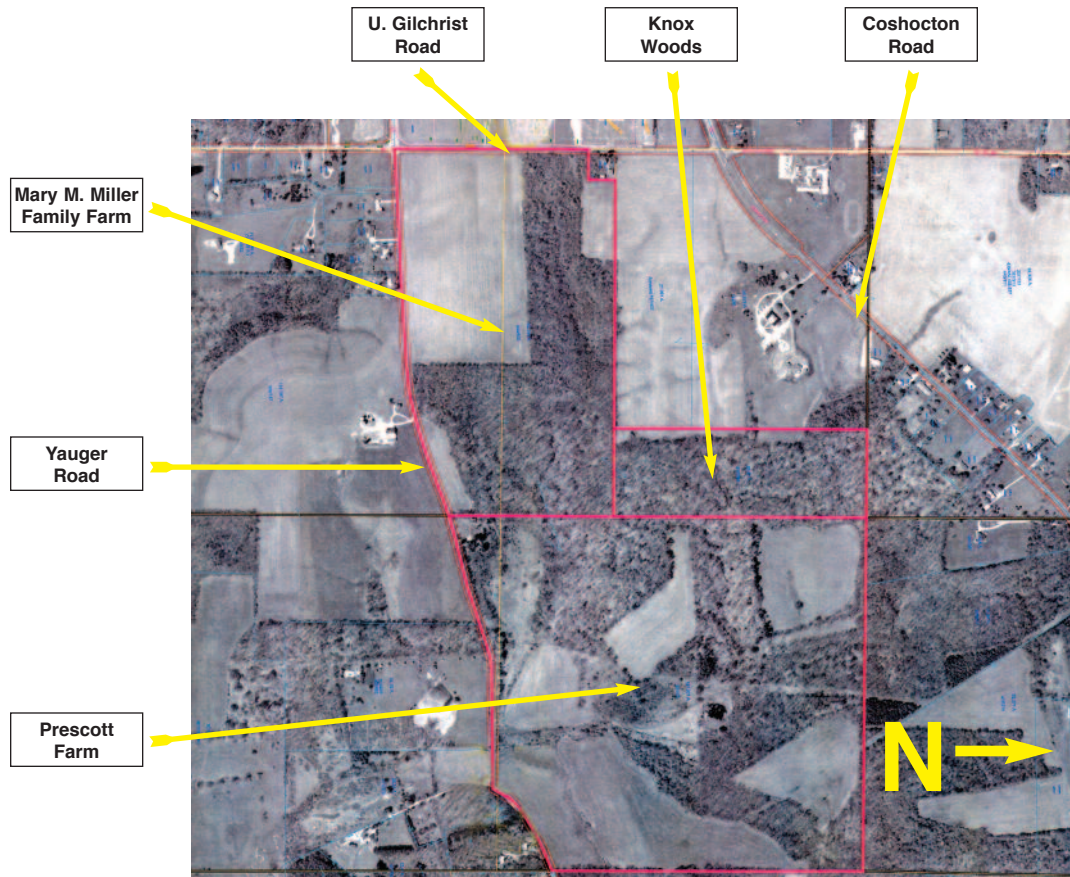
## HOW TO CONTACT THE COMMUNITY FOUNDATION

**Sam Barone, Executive Director**  
**Community Foundation of**  
**Mount Vernon & Knox County**  
**One South Main Street • P.O. Box 1270**  
**Mount Vernon, OH 43050**  
**Phone: (740) 392-3270 • Fax: (740) 399-5296**  
**email: [thefoundation@firstknox.com](mailto:thefoundation@firstknox.com)**



# Wolf Run Regional Park

*This Geographic Information System (G.I.S.) image from the Knox County Map Office shows outlined in pink the new Wolf Run Regional Park. In 2002, a Community Foundation grant of the 93-acre tract identified as the "Mary M. Miller Farm" provided the Knox County Park District necessary matching funds for a \$614,000 Clean Ohio Grant to purchase the 167-acre "Prescott Farm." Knox County Commissioners contributed Knox Woods to complete the creation of the 290-acre preserve. (See "The Year in Review." pg. 1.)*



## COMMUNITY FOUNDATION OF MOUNT VERNON & KNOX COUNTY

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