

2003 Annual Report

Community Foundation
Of Morgan County

Building
Community

Building Community

-involvement
-enrichment
-diversity
-generosity
-support
-connections
-education
-recognition
-contribution
-cooperation
-interaction

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DEAR FRIENDS OF THE COMMUNITY FOUNDATION *Building Community Involvement*

The Community Foundation of Morgan County has a goal of reaching out to all the different communities of our county. These include not only geographic communities but also communities of people who have similar interests, problems, or goals. In reaching out to these groups, progress has been made in helping them achieve their goals and, therefore, ours.

Our Farmers Breakfast and business luncheons brought together people in these communities to learn how their interest in charitable giving could have a greater impact in Morgan County and conserve their resources.

The student community, consisting of Morgan County citizens of all ages interested in furthering their education, is aided by scholarships given or administered by the Community Foundation. The Lilly Endowment Community Scholarships, Kendrick Foundation Scholarships and many smaller scholarships provide thousands of dollars each year for advanced study. Several of these scholarships are endowed by contributions of all sizes, from people like you.

The Community Foundation of Morgan County also makes grants to support the arts, historic preservation and other needs in our community. These also come directly from the Foundation or special endowments dedicated to a specific purpose. Every gift, no matter the amount, gives back so much more to the community when combined with others for a like purpose.

The staff and Board of Directors of the Foundation thank **you** for your support in helping to build a better community.

Sincerely,



Raymond Blunk
President



OUR MISSION

**THE COMMUNITY FOUNDATION OF MORGAN COUNTY, INC.,
WORKS WITH OUR CITIZENS TO ENHANCE
THE QUALITY OF LIFE FOR CURRENT AND FUTURE GENERATIONS.
WE ACCEPT GIFTS, ADMINISTER FUNDS, AND
MAKE GRANTS TO MEET NEEDS THROUGHOUT
THE COUNTY.**

WHAT IS A COMMUNITY FOUNDATION?

A community foundation is a vehicle that provides all people with the means to enhance the quality of life in their community. Individuals, families, organizations and businesses can establish permanent charitable funds which will benefit generations to come and become a lasting legacy.

The role of the foundation is to invest and administer these funds according to the wishes of the fund-holder, allowing long-term growth and commitment.

Most often these funds benefit the community in the form of grants or scholarships awarded to individuals or groups engaged in charitable activities.

OUR GOALS

THE COMMUNITY FOUNDATION OF MORGAN COUNTY, INC.,
WILL

- ◆ **BE THE PHILANTHROPIC LEADER IN THE COUNTY,**
- ◆ **MAKE ALL CITIZENS AWARE OF OUR EXISTENCE,**
- ◆ **INCREASE OUR UNRESTRICTED ENDOWMENT,**
- ◆ **SERVE AS A RESOURCE FOR CHARITABLE INFORMATION,**
- ◆ **IMPROVE COLLABORATION AMONG COMMUNITY ORGANIZATIONS TO MAXIMIZE AVAILABLE RESOURCES**

HOW TO APPLY FOR A GRANT OR SCHOLARSHIP

The Community Foundation makes grant and scholarship applications available through community agencies and through the schools. Anyone wishing to obtain information or apply may contact the Foundation office.

*Community Foundation of Morgan County, Inc.
250 North Monroe Street
 Mooresville, Indiana 46158
317-831-1232
cfmc@cfmconline.org*

GRANTS AWARDED IN 2003

Building Community Enrichment

Mental Health Assn. in Morgan County
\$985: anger management materials

Child-Adult Resource Services, Inc.
\$964.52: playground equipment in Morgantown

Gallery 2:34 in Memory of Tim Wallman
\$375: "No More Starving Artists"

Barbara B. Jordan YMCA
\$632.33: learning stations

Mooresville HS National Honor Society
\$958: Mooresville history publication

Eminence Elementary School
\$670: visiting author

Wilbur Community Center Corp.
\$755: cement work

Martinsville P.R.I.D.E.
\$1,000: "A Night on Indiana Avenue"

Mooresville Park & Recreation District
\$800: Civil War music

Mooresville Park & Recreation District
\$900: teen concert series

Mooresville Area Council of the Arts
\$1,000: Arts in the Park 2004

Hall Elementary PTO
\$820: Tom Sawyer at Clowes Hall

Mooresville Revitalization Group
\$700: puppets for Victorian Christmas

Mooresville Area Council of the Arts
\$700: tax-exempt status filing,
\$300: event publicity

Morgan County History & Genealogy Association
\$1000: Stage 2 Old North Episcopal Cemetery

"A NIGHT ON INDIANA AVENUE" *Building Community Diversity*

The Foundation was pleased to present a grant to the Martinsville P.R.I.D.E. (People Respecting Individuality and Diversity in Everyone) for "A Night on Indiana Avenue," a program promoting and encouraging cultural diversity in Morgan County.

Martinsville P.R.I.D.E. was formed to encourage racial tolerance and respect within the community. The group sponsors events which are intended to build a receptive atmosphere and unite people of all racial backgrounds, building community understanding of cultural diversity.

An evening of musical entertainment, "A Night on Indiana Avenue," offered performances by African-American artists Ayaba Bey, Silver Heart Singers and Mud Kids, who demonstrated a variety of musical styles including folk music, blues, gospel and positive rap. The program also included the presentation of history and interesting facts about the music, offering cultural enlightenment as well as entertainment.

The Foundation takes its role seriously in encouraging programs such as this, embracing cultural exchange and building community diversity.



FUNDS HELD BY THE COMMUNITY FOUNDATION

Building Community Generosity

OPERATING AND UNRESTRICTED FUNDS

Evergreen Fund

General fund supporting the daily operation of the foundation.

Evergreen Endowment

Fund providing permanent support for our operations.

CommonWealth Endowment

Unrestricted endowment fund addressing needs in the county.

Legacy Endowment

Endowment receiving tribute, honorary and memorial gifts.

SCHOLARSHIP FUNDS

Scholarship funds help students pursue academic goals. Those establishing these funds may define guidelines for administration of the fund.

Ann Haworth Memorial Scholarship Fund

Provides scholarships for Martinsville High School graduates.

Anna K. Stierwalt Scholarship Fund

Provides scholarships for graduates of Eminence High School.

Archie & Blanche Burnett Memorial Scholarship Fund

Provides scholarships for graduates of Eminence High School.

Charles F. and Olive B. Flater Scholarship Fund

Provides scholarships for graduates of Mooresville High School.

Eminence Alumni Association Scholarship Fund

Provides scholarships for graduates of Eminence High School.

Henry Percy Memorial Scholarship Fund

Provides scholarships for graduates of Martinsville High School.

John E. Koontz Memorial Scholarship Fund

Provides scholarships for Martinsville High School track participants.

John R. Gilbert Memorial Scholarship Fund

Provides scholarships for Morgan County 4-H students for post-secondary education.

Judge James E. Harris Scholarship Fund for Children in Need

Provides funds for children in need of services.

Justin & Bonita Conduitt Marley Scholarship Fund

Provides scholarships for Mooresville and Monrovia High School students studying education or vocational curriculum.

Maggie Grounds Scholarship Fund

Provides scholarships for female Morgan County students studying architecture, drafting, engineering, and/or computer-aided drafting.

Never Too Late Scholarship Fund

Provides scholarships for Morgan County residents age 30 and older who are returning to school.

Pat Bartram Memorial Scholarship Fund

Provides scholarships for Morgan County students studying law enforcement.

continued on next page

***IT IS ONE OF THE MOST BEAUTIFUL
COMPENSATIONS OF LIFE,
THAT NO MAN CAN SINCERELY
TRY TO HELP ANOTHER
WITHOUT HELPING HIMSELF***

RALPH WALDO EMERSON

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Robert D. St. Clair Memorial Scholarship

Provides scholarships for students graduating from Martinsville High School.

Sgt. Dan Starnes Memorial Scholarship Fund

Provides scholarships for Morgan County residents studying law enforcement.

The Richard H. Crosser Memorial Scholarship Fund for Mooresville High School

Provides scholarships for graduates of Mooresville High School.

Velma M. Hackelman-Mendenhall Memorial Scholarship Fund

Provides scholarships for graduates of Mooresville High School.

Virgil Telfer Memorial Scholarship Fund

Provides scholarships for graduates of Martinsville High School.

ENDOWMENT FUNDS

Endowment funds are permanently invested to produce income. The income earned is used to help meet needs in Morgan County.

Academy Building Endowment Fund

Provides funds to maintain historic Academy Building.

Barry Schroeder Fund

Provides support for non-funded needs of Morgan County Public Library.

Claire & Helen Cook Fund for the Mooresville Library

Provides support for the children's section of the Mooresville Public Library

Community Service Center of Morgan County

Benefits Wellspring.

Ellis Robinson/ First Christian Church Scholarship Fund for Fellowship Of Christian Athletes

Provides funds for FCA athlete to attend camp.

Emily Carolyn Mills Endowment Fund

Proceeds used to enhance the Emily Carolyn Mills Room of the Academy Building.

Fred C. & Edith N. Tullis Humane Society Fund

Provides support for the Morgan County Humane Society.

Manley Family Endowment Fund

Provides support for Martinsville Weekday Religious Education, Morgan County Well Child Clinic, Morgan County Habitat for Humanity, and James Whitcomb Riley Hospital Association.

Martinsville Downtown Christmas Decorations Fund

Proceeds used for Christmas decorations for downtown Martinsville.

Martinsville Pool Endowment Fund

Proceeds used for maintenance of the Jimmy Nash Park pool.

Mooresville Band Parents Music Scholars Endowment

Promotes band activities and increases band participation at Mooresville High School.

Myra Hochstettler Fund

Used for construction and/or maintenance of shelter houses and gazebos in Jimmy Nash Park, Martinsville.

Newby Gym Endowment Fund

Provides funds for maintenance of historic Newby Gymnasium.

Stephen & Susan Leonard Community Fund

Fund provides support to community-based organizations and other charitable activities.

Steve Carrell Endowment for the Arts

Provides funding for the arts in Morgan County.

Stuart Ruona Fund for the Morgan County Humane Society

Provides support for the Humane Society.

Thank A Teacher Endowment Fund

Provides grants for special programs of Mooresville classroom teachers.

Weekday Religious Education Endowment Fund

Provides funds for Weekday Religious Education in Morgan County.

continued on next page

OTHER CHARITABLE FUNDS

The foundation holds several different types of funds, including donor-advised funds, non-permanent funds and field-of-interest funds.

Academy Building Museum Fund

Provides funds for Academy Museum.

Barbara B. Jordan YMCA Independence Fund

Provides support for the Barbara Jordan YMCA.

Churches in Mission

Provides funds for mission serving those in need.

Gallery 2:34 Fund

Provides funds for after school arts programs.

Komets Soccer Club Fund

Supports the activities of the Mooresville Komets Soccer Club.

Martinsville Christmas at the Park Fund

Provides funds for Christmas decorations.

Martinsville Halloween at the Park Fund

Provides funds for Halloween decorations.

Meaghan Buis Fund

Provides funds for graduates of Eminence High School.

Methodist Episcopal Cemetery Restoration Fund

Provides support for the restoration of the Methodist Episcopal Cemetery in Mooresville.

Monroe-Gregg School Corporation License Plate Fund

Provides funds for education needs.

Mooresville Area Council of the Arts

Provides support for the local arts council, MACOA.

Mooresville Area Senior Citizens Center Fund

Provides support for the activities of the Mooresville Senior Citizens Center.

Mooresville Christian School Gift Fund

Provides support for the activities of Mooresville Christian Academy.

MCSC Educational Technology Fund

Proceeds from sale of education license plates used for Mooresville schools purposes.

Mooresville Downtown Business Association Fund

Provides support for the Downtown Business Association.

Mooresville Revitalization Group Fund

Provides support for the town revitalization group.

Morgan County Arts Fund

Provides funds for arts in Morgan County.

Morgan County Veterans Memorial Fund

Provides funds for Veterans Memorial in Martinsville.

Morgantown Area Veterans Memorial Fund

Provided funds for building a veterans memorial in Morgantown cemetery.



Pro Players House Fund

Provides support for the Pro Players House domestic violence program.

Sammy L. Davis Recognition Fund

Provide funds for a bust of Davis, Medal of Honor Recipient.

Tornado Relief Fund

Provides funds for victims of tornado.

NEVER TOO LATE SCHOLARSHIP ENDOWMENT FUND

Building Community Support



Polly Amy of Eminence, in a desire to encourage Morgan County residents to pursue their education through adulthood, has created the Never Too Late Scholarship Endowment Fund for those 30 years old and over.

Polly established the fund to honor the accomplishments of a dear friend, Carol Smile, who returned to school after her family was raised, while simultaneously working and caring for her ailing husband.

The Never Too Late Fund recognizes the special contributions made by this friend whose ensuing nursing work with Alzheimer's patients and encouragement of others in this field of work is an inspiration to all.

Polly supports her fund with the sales of the Never Too Late Cookbook, a collection of favorite recipes, including her own and those of friends and family.

Known to be a gracious hostess, and generous with recipes and ideas from her own kitchen, Polly further uses her cookbook to promote her belief in the importance of sharing homemade meals with family and friends.

Combining this respect for the educational achievements and nursing contributions of her friend as well as her philosophy of the importance of being a gracious hostess, Polly presents us with a shining example of how one person can reach out to the community, building support and encouragement for others.

FARMER'S BREAKFAST

Building Community Connections

With a vision of building community by connecting with special groups in our county, the Community Foundation presented a Farmer's Breakfast during the 2003 Morgan County Fair, making connections with over 100 people.

Titled *Planting the Seeds of Philanthropy*, the breakfast program offered information to guests about charitable gift, estate and tax planning, subjects of special interest to farm and land owners in the agricultural community.

The Farmer's Breakfast was intended to plant philanthropic ideas and encourage thoughtful financial planning, which will benefit the agricultural families and ultimately the communities of Morgan County.

Guest speakers were Mauri Williamson, retired Executive Director of the Purdue Agricultural Alumni Association, and Lawrence Lawhead, partner at Barnes and Thornburg, specializing in Business, Tax and Real Estate.

In reaching out to our farmers, who have traditionally been the foundation of our rural communities, we strive to build a connection, offering service to our agriculture community while introducing ideas of charitable gift planning.



LILLY ENDOWMENT COMMUNITY SCHOLARSHIPS

Building Community Education

Amy Viles of Mooresville High School, Arthur Janneck of Martinsville High School and Kristen Gunnell of Mooresville High School were named 2003 recipients of the Lilly Endowment Community Scholarships for Morgan County.



The scholarships, presented and administered annually by the Community Foundation, provide full tuition for four years at the Indiana college or university of the scholar's choice.

Seven promising students from Morgan County High Schools were selected as finalists in the program. From that list of outstanding students, the three recipients were selected.

The purpose of the Lilly Endowment Community Scholarship program is to help raise the level of educational attainment in Indiana and to leverage further the ability of Indiana's community foundations to enhance the quality of life of the state's residents.

Finalists included Brent Evans of Mooresville High School; Molly Huntzman of Mooresville High School, Karen Menzel of Monrovia High School and Joseph Smith of Mooresville High School.

MAKE A DIFFERENCE MORGAN COUNTY

Building Community Recognition

In order to recognize the efforts of Morgan County citizens, and in an effort to nurture the spirit of philanthropy, the Foundation held the second annual *Make A Difference Morgan County* celebration in November, 2003.

This program gives citizens a chance to honor the community's unsung heroes-those people who make a habit of doing good without thought to credit or recognition.

At the same time, nominators make a contribution to the Foundation's Common Wealth Endowment- the fund from which the Foundation makes a difference through its grants to charitable organizations of Morgan County.

Any person may make a difference by recommending an individual, group or organization that made a beneficial contribution to the *Make A Difference Morgan County Honor Roll*. In 2003, the Foundation honored 45 individuals and 3 organizations that made a contribution for the betterment of the community.

The Community Foundation of Morgan County is focused on enhancing the quality of life for citizens of our county. The care, commitment and giving nature of individual citizens helps make this goal possible.

Make A Difference Morgan County seeks to build community recognition for the generosity, caring and hard work of the people who live here.

MAKE A DIFFERENCE



2003 DONORS

The Community Foundation thanks the following individuals and organizations who contributed to one or more funds.

Building Community Contribution

A & A Transmission, Inc.
Leo & Frances Abbott
James & Linda Abel
Ace Tool & Engineering
Jim Ackerman
Ernest R. Adams
Garry & Rebecca Adams
Alexander Insurance Agency
Ruth Alexander
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Samuel & Claudia Cline
Coffee Tea & Potpourri
Coffin, Coffin & Mayfield
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Football Family
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Department Club
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Dunn
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Eric Eggleton
Elaine B. Ellett
Eminence Alumni Association
Eminence High School
Sunshine Society
Farm Credit Services
Lou & Constance Feagans
George & JoAnne Fields
Sharon Fields
William & Elsie Finchum
First Bank
First Christian Church-
Martinsville
First Christian Church-
Mooresville

First Indiana Bank-Mooresville
First Presbyterian Church
First United Methodist Church,
Men's Group
Foley, Foley & Peden
Ralph & Ann Foley
Footsteps Montessori, Inc.
Lester Fortner
Mike Francis
Curtis & Sheila Freeman
Erin Frew
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Chapter
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Chapter
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Mr. & Mrs. McGhee
Don & Donna McGuire
Paula McKay
Raymond & Catherine
McNabney
Metagenics Midwest Inc.

The Kendrick Foundation, a supporting organization of the Community Foundation of Morgan County, was established in 2001 as a vehicle to assist health related programs benefiting residents of Morgan County.

With assets of over \$26 million, the Kendrick Foundation exists to contribute grant monies to medical and health programs, provide support to community healthcare outreach programs, provide

financial support to hospice programs, provide healthcare education, and provide financial support to programs for the medically indigent.

Kendrick Foundation is governed by a six member board of directors who carry the responsibility for the investments, grants and scholarships.

The Community Foundation provides professional and technical services to support the operations of the Kendrick Foundation.

DONORS continued

MIBOR

William Michel
Midland Co-op
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Lon Milburn
H. Richard & Marcia Miles
John & Miriam Mills
Molex
Monrovia Mudworks LLC
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Mooresville Lions Club
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Morgan County Farm
Bureau, Inc.
Morgan County Feed
Morgan County Insurance
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William Vanderpol, Jr., Attny
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Norman D. & Barbara Voyles
Wade-Duvall Associates, LLC
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Mary Rose Walker
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Julie Wallman
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Every effort has been made to ensure the accuracy of this list. Please contact us with any corrections that may be made. Thank you for your generous support.

FINANCIAL REPORT

Community Foundation of Morgan County, Inc.

Statement of Financial Position

As of December 31, 2003

| | Unrestricted | Temporarily Restricted | Permanently Restricted | Total |
|---|-----------------------|---------------------------|---------------------------|-----------------------|
| Assets | | | | |
| Cash on Hand | \$106,151.32 | \$1,152.69 | \$190.25 | \$107,494.26 |
| Money Market | 131,450.92 | 200,292.52 | 65,316.76 | 397,060.20 |
| Certificates of Deposit | 40,000.00 | | 196,703.20 | 236,703.20 |
| Lilly Community Scholarships | | 180,915.34 | | 180,915.34 |
| Hochstettler CD & Savings | 20,069.29 | | 71,120.10 | 91,189.39 |
| Joint Investments | 936,812.59 | | 464,275.57 | 1,401,088.16 |
| Cook Endowment (Non-joint Investment) | 123,203.13 | | 1,145,843.43 | 1,269,046.56 |
| Grounds | 4,089.49 | | 30,802.08 | 34,891.57 |
| Management Fees Receivable | (406.99) | | | (406.99) |
| Prepaid Expenses | 221.58 | | | 221.58 |
| Postage in Meter & TMS Bank | 858.17 | | | 858.17 |
| Leasehold Improvements | 295,667.00 | | | 295,667.00 |
| Office Equipment | 26,304.00 | | | 26,304.00 |
| Equipment Over \$500 | 4,633.77 | | | 4,633.77 |
| Software Over \$500 | 26,500.27 | | | 26,500.27 |
| Accum Deprec-Leasehold Impr. | (35,481.00) | | | (35,481.00) |
| Accum Deprec. - Office Equipment | (24,624.37) | | | (24,624.37) |
| Total Assets | \$1,655,449.17 | \$382,360.55 | \$1,974,251.39 | \$4,012,061.11 |
| Liabilities and Net Assets | | | | |
| Accounts Payable | (2,027.95) | 0.00 | 0.00 | (2,027.95) |
| Subtotal Liabilities | (2,027.95) | 0.00 | 0.00 | (2,027.95) |
| Net Assets - Unrestricted | 1,571,163.66 | (289,946.64) | (77,795.25) | 1,203,421.77 |
| Net Assets - Temp Restricted | 8,213.56 | 669,495.76 | 16,142.41 | 693,851.73 |
| Accumulated Earnings | (86,942.07) | 2,661.43 | (500,468.88) | (584,749.52) |
| Net Assets - Perm. Restricted | 113,542.00 | 150.00 | 2,587,873.08 | 2,701,565.08 |
| Subtotal Net Assets | \$1,605,977.15 | \$382,360.55 | \$2,025,751.36 | \$4,014,089.06 |
| Total Liabilities and Net Assets | \$1,603,949.20 | \$382,360.55 | \$2,025,751.36 | \$4,012,061.11 |

BOARD OF DIRECTORS

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Raymond Blunk, *Paragon*
President

Pamela Siddons, *Mooreville*
Vice President

David M. Kollmeyer, *Mooreville*
Secretary

Robert Kinder, *Martinsville*
Treasurer



Members of the Board

Pauline Amy – *Eminence*
Ronald Bell – *Martinsville*
Cynthia Brewer – *Mooreville*
Bill Colbert – *Mooreville*
Lou Feagans – *Martinsville*

Susan Haynes – *Mooreville*
David Keister – *Martinsville*
Ann Lankford – *Martinsville*
Stephen Leonard – *Martinsville*
Dana Lynn – *Brooklyn*

Vikki Poynter – *Morgantown*
Rachel Ruona – *Mooreville*
Ruth Rusie – *Martinsville*
Jacki Shields – *Martinsville*
Wendell Thaler – *Mooreville*

WHAT DO WE
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GEORGE ELIOT

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Cynthia Brewer
Dave Keister
Bill Colbert

Community Relations

Sylvia McCollum
Rachel Ruona
Bill Colbert
Lou Feagans
Jackie Marsh
Betty Heshelman
Bettye Wittenbach

Finance

Steve Leonard
Bob Kinder
Pamela Siddons
Dave Kollmeyer
Wendell Thaler
Marty James

Grants

Vikki Poynter
Jacki Shields
Sylvia McCollum
Jay Kondo
Herb Haggard

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Ray Blunk
Pamela Siddons
Dave Kollmeyer
Bob Kinder
Ruth Rusie
Jean Shelton
Randy Haymaker
Steve Main
Susan Haynes

Scholarship

Ann Lankford
Ron Bell
Rachel Ruona
Wendell Thaler
Juanita Fennell
Sylvia McCollum
Polly Amy



Building Community Interaction



Community Foundation
Of Morgan County

250 N. Monroe Street
Mooreville, IN 46158-1551
317-831-1232 fax 317-831-2854