

**Oldham County Fiscal Court
Grant Application**

Date of Application: December 15, 2024

Official Name of Organization: Oldham County Community Scholarships, Inc

Address: PO Box 381 Buckner, KY 40010

EIN: 46-3388305

Date and Place of Incorporation: 08-14-2004, Oldham County, KY

Name, Complete Address, Email and Phone Number of Contact Person:

Peggy Hanzalik, Co-Treasurer

7306 Abbott Glen Dr. Crestwood, KY 40014

occskyinfo@gmail.com; peghanz3@gmail.com

PH - 502-741-7731

Purpose of Organization or Mission Statement and Services Rendered: Our mission is dedicated to helping students in Oldham County achieve their higher education dreams. The OCCS Board of Directors is comprised of volunteer community leaders who are passionate about encouraging students to pursue higher education with the support of their community. This nonprofit was started in 2004 and in May 2005 distributed \$35,000. In 2024 we awarded \$141,100 in new scholarships and an additional \$24,000 in renewable scholarships. The award ceremony in 2025 the organization will set a milestone and cross the \$2,000,000 mark in total scholarships awarded to students in Oldham County.

Amount Requested: \$ 3,000 - \$6,000

Proposal for funding. On a separate page, please provide the following:

Statement of need for project

Proposed use of funds to remediate the need

Project budget

Attachments:

List of Officers and Directors – Name, Office, Address, Business Affiliation, Compensation from Organization.

- Copy of 501c(3) tax-exempt status letter from IRS;
- Documentation for most recent form 990;
- Documentation for most recent filing with KY Secretary of State;
- Most recent Organization/Agency budget **summary**, or balance sheet, or income/expense statement (Please, no complete budgets!);
- If a recipient of funds for the prior year, a statement of the use of those funds;
- Photographs, videos, letters of support.

Submission Guidelines:

Email complete applications to: Becky Zocklein rzocklein@oldhamcountky.gov no later than 12/30/2024.

OCFC – Application pg 2

Proposal for funding.

Statement of need for project:

Our mission of providing financial assistance to any Oldham County student that is graduating from any Oldham County High School, or private or home school. This funding benefits the student applicants from Oldham County, KY. Scholarships are provided by the generosity of local school and civic organizations, businesses and individuals.

Proposed use of funds to remediate the need:

One hundred percent of the funds would be used to fund scholarships with the criteria established by Oldham County Fiscal Court. Depending on the funding approved the scholarships would be from 3 to 6 scholarships awarded with student selections from the 3 area high schools.

With high standards of objective scoring and blind selection, OCCS matches applicants with scholarships as outlined by the sponsors' criteria, which allows us to grant higher education opportunities through scholarships to Oldham County's graduates.

Project budget:

Funding of \$3,000 - Scholarships awarded would be 3 @ \$1,000 each from OCHS, SOHS and NOHS.

Funding of \$6,000 - Scholarships awarded would be 6 @ \$1,000; 2 each from OCHS, SOHS and NOHS.

Attachment 1:

Organization ID 0864576.09.99999
Type KCO
Date of organization 08/14/2013
Last annual report 06/30/2024
Annual report type annual report
Principal office P.O. BOX 381
BUCKNER KY 40010

Current Officers

President Jared Barrett, 1001 Donovan Court, Goshen, KY 40026
Secretary Laura Stoess, 7001 Oak Valley Dr Pewee Valley, KY 40056
Treasurer Sandy Chastain-Brough, 7303 Abbott Glen Dr. Crestwood, KY 40014
Peggy Hanzalik, 7306 Abbott Glen Dr. Crestwood, KY 40014

Directors

Director Kelly Hagan, 3109 Schoolhouse Rd Goshen, KY 40026
Director Michael Dinga, 2202 Meadowbrook Drive LaGrange, KY 40031
Director Angela Gardiner, P.O. Box 284, Pewee Valley, KY 40056
Director Kathie Powell, 6238 Perrin Dr, Crestwood, KY 40014
Director Jennifer Reitnauer, 13006 Reading Rd, Goshen KY 40026
Director Deuce Sapp, 6005 Centerwood Dr, Crestwood, KY 40014
Director Olivia Sapp, 6005 Centerwood Dr, Crestwood, KY 40014

The Board of Directors for Oldham County Community Scholarships, serves on a voluntary basis and receives no compensation for the work provided to this 501(c)(3) organization.

Form 990

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2021

Open to Public
InspectionDepartment of the
Treasury
Internal Revenue
Service

For the 2021 calendar year, or tax year beginning 01-01-2022, and ending 12-31-2022

B Check if applicable:

- Address change
- Name change
- Initial return
- Final return/terminated
- Amended return
- Application pending

C Name of organization OLDHAM COUNTY COMMUNITY SCHOLARSHIP		D Employer identification number 46-3388305
Doing business as		E Telephone number
Number and street (or P.O. box if mail is not delivered to street address) POST OFFICE BOX 381		Room/suite
City or town, state or province, country, and ZIP or foreign postal code BUCKNER, KY 40010		

F Name and address of principal officer: ANGELA GARDINER 12108 ALPINE WAY GOSHEN, KY 40026	H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
	H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No
	If "No," attach a list. See instructions.
	H(c) Group exemption number ►

I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527	L Year of formation: 2013	M State of legal domicile: KY
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J Website: ► WWW.OCCS-KY.ORG	K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ►	
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Part I Summary														
1 Briefly describe the organization's mission or most significant activities: OLDHAM COUNTY COMMUNITY SCHOLARSHIPS WAS INCORPORATED IN AUGUST 2013 FOR THE PURPOSE OF PROVIDING SCHOLARSHIPS TO STUDENTS RESIDING IN OLDHAM COUNTY, KENTUCKY. THE ORGANIZATION ENGAGES SPONSORS WHO PROVIDE SCHOLARSHIPS TO THE STUDENTS RANGING FROM 500 TO 5000. IN ADDITION, DONATIONS ARE RAISED THROUGH FUNDRAISERS OR INDIVIDUAL DONORS AND AGGREGATED INTO SCHOLARSHIPS. SCHOLARSHIP SPONSORS IDENTIFY A SET OF CRITERIA UPON WHICH THE FUNDS WILL BE AWARDED. APPLICATIONS ARE TAKEN DURING THE MONTH OF FEBRUARY. APPLICATIONS ARE SCORED THROUGH A BLIND SCORING METHOD AND RECIPIENTS ARE SELECTED BASED UPON THE HIGHEST SCORE MATCHING THE SPONSOR'S CRITERIA. SCHOLARSHIPS ARE AWARDED IN MAY.														
<p>2 Check this box ► <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.</p> <p>3 Number of voting members of the governing body (Part VI, line 1a)</p> <p>4 Number of independent voting members of the governing body (Part VI, line 1b)</p> <p>5 Total number of individuals employed in calendar year 2021 (Part V, line 2a)</p> <p>6 Total number of volunteers (estimate if necessary)</p> <p>7a Total unrelated business revenue from Part VIII, column (C), line 12</p> <p>Net unrelated business taxable income from Form 990-T, Part I, line 11</p>														
<table border="1"> <tr> <td>3</td> <td>11</td> </tr> <tr> <td>4</td> <td>11</td> </tr> <tr> <td>5</td> <td>0</td> </tr> <tr> <td>6</td> <td></td> </tr> <tr> <td>7a</td> <td>0</td> </tr> <tr> <td>7b</td> <td></td> </tr> </table>			3	11	4	11	5	0	6		7a	0	7b	
3	11													
4	11													
5	0													
6														
7a	0													
7b														
<p>8 Contributions and grants (Part VIII, line 1h)</p> <p>9 Program service revenue (Part VIII, line 2g)</p> <p>10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)</p> <p>11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)</p> <p>12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)</p>														
<table border="1"> <tr> <td>Prior Year</td> <td>Current Year</td> </tr> <tr> <td>153,511</td> <td>225,713</td> </tr> <tr> <td></td> <td>0</td> </tr> <tr> <td>1</td> <td>3</td> </tr> <tr> <td></td> <td>0</td> </tr> <tr> <td>153,512</td> <td>225,716</td> </tr> </table>			Prior Year	Current Year	153,511	225,713		0	1	3		0	153,512	225,716
Prior Year	Current Year													
153,511	225,713													
	0													
1	3													
	0													
153,512	225,716													
<p>13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)</p> <p>14 Benefits paid to or for members (Part IX, column (A), line 4)</p> <p>15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)</p> <p>16a Professional fundraising fees (Part IX, column (A), line 11e)</p> <p>b Total fundraising expenses (Part IX, column (D), line 25) ► 0</p> <p>17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)</p> <p>18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)</p> <p>19 Revenue less expenses. Subtract line 18 from line 12</p>														
<table border="1"> <tr> <td>Beginning of Current Year</td> <td>End of Year</td> </tr> <tr> <td>58,497</td> <td>140,383</td> </tr> <tr> <td>3,250</td> <td>3,250</td> </tr> <tr> <td>55,247</td> <td>137,133</td> </tr> </table>			Beginning of Current Year	End of Year	58,497	140,383	3,250	3,250	55,247	137,133				
Beginning of Current Year	End of Year													
58,497	140,383													
3,250	3,250													
55,247	137,133													
<p>20 Total assets (Part X, line 16)</p> <p>21 Total liabilities (Part X, line 26)</p> <p>22 Net assets or fund balances. Subtract line 21 from line 20</p>														

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign
Here

Signature of officer

2023-11-03

Date

SANDY CHASTAIN-BROUGH TREASURER
Type or print name and titlePaid
Preparer
Use Only

Print/Type preparer's name Firm's name ► KELLY KING & CO	Preparer's signature	Date 2023-11-03	Check <input checked="" type="checkbox"/> if self-employed	PTIN P00174526
Firm's address ► 6321 HIGHWAY 329 CRESTWOOD, KY 40014		Firm's EIN ► 61-1317455		
		Phone no. (502) 241-5656		

May the IRS discuss this return with the preparer shown above? (see instructions)

 Yes No

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 14 2014**

OLDHAM COUNTY COMMUNITY
SCHOLARSHIPS INC
3109 SCHOOL HOUSE RD
GOSHEN, KY 40026

Employer Identification Number:
46-3388305
DLN:
17053007312004
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(vi)
Form 990 Required:
Yes
Effective Date of Exemption:
August 14, 2013
Contribution Deductibility:
Yes
Addendum Applies:
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,



Director, Exempt Organizations

1960

**Commonwealth of Kentucky
Michael G. Adams, Secretary of State**

Michael G. Adams
Secretary of State
P. O. Box 1150
Frankfort, KY 40602-1150
(502) 564-3490
<http://www.sos.ky.gov>

**Annual Report
Online Filing
For the Year 2024**

ARP

Company: OLDHAM COUNTY COMMUNITY SCHOLARSHIPS, INC.

Company ID: 0864576

State of origin: Kentucky

Formation date: 8/14/2013 12:00:00 AM

Date filed: 6/30/2024 12:36:24 PM

Fee: \$15.00

Principal Office

P.O. BOX 381
BUCKNER, KY 40010

Registered Agent Name/Address

KELLY HAGAN
3109 SCHOOL HOUSE ROAD
GOSHEN, KY 40026

Current Officers

President	Jared Barrett	P.O. Box 381, Buckner, KY 40010
Secretary	Laura Stoess	7001 Oak Valley Dr Pewee Valley, KY 40056
Treasurer	Sandy Chastain-Brough	7303 Abbott Glen Dr. Crestwood, KY 40014
Treasurer	Peggy Hanzalik	7306 Abbott Glen Dr. Crestwood, KY 40014

Directors

Director	Kelly Hagan	3109 Schoolhouse Rd Goshen, KY 40026
Director	Michael Dinga	2202 Meadowbrook Drive LaGrange, KY 40031
Director	Kathie Powell	Oldham County, Kentucky
Director	Jennifer Reitnauer	Oldham County, Kentucky
Director	Deuce Sapp	Oldham County, Kentucky
Director	Angela Gardiner	PO Box 284, Pewee Valley, KY 40056

County:	Oldham
Business size:	Small
Business type:	Educational Services

Signatures

Signature	Peggy Hanzalik
Title	Co-Treasurer

Oldham County Community Scholarships
BUDGET WORKSHEET
Aug 1 thru July 31

Categories - Income	Budget 2024-2025	Actual 2025	Actual 2024 QB
Administrative Fees	\$ 1,875.00		\$ 1,825.00
Grants - Operating Cost	\$ 3,350.00		\$ 2,000.00
Kroger Donations	\$ 125.00		122.39
Cyber Grants	\$ 200.00		
Interest Income	\$ 100.00		\$ 101.85
Individual Donations	\$ 3,500.00		\$ 3,186.62
Fundraising	\$ 1,000.00		\$ 2,426.91
Total Income	\$ 10,150.00		\$ 9,662.77
Total Expenses			
Advertising			
Award Ceremony Expenses	\$ (708.62)		
Sponsor 20-yr awards	\$ (520.00)		\$ (1,429.98)
Coping Presentation	\$ (35.00)		\$ (32.88)
Student Packets	\$ (250.00)		\$ (242.90)
Program Expenses	\$ (475.00)		\$ (455.00)
Licenses & Permits	\$ (15.00)		\$ (15.00)
QBO	\$ (350.00)		\$ (339.20)
KY State Annual Report	\$ (15.00)		\$ (15.00)
Website - Kelly to submit	\$ (225.00)		\$ (225.00)
Insurance	\$ (1,676.00)		\$ (1,523.00)
PO Box Rental	\$ (90.00)		\$ (82.00)
Postage	\$ (72.00)		\$ (68.00)
OCCS Board Scholarship 2025	\$ (3,000.00)		\$ (3,000.00)
Web Development	\$ (3,500.00)		\$ -
Bank Fees			\$ -
Dues & Subscriptions	\$ (20.00)		\$ (20.00)
Total Operating Expenses	\$ (10,951.62)		\$ (7,447.96)
Net Proposed Gain	\$ (801.62)		\$ 2,214.81

How You Can Help

- Kroger Community Rewards.** A simple way to help fund college Scholarships – link Oldham County Community Scholarships to your Kroger card!
- Support our Annual Fundraising Auction.** Donate items to sell or bid on the amazing items we offer in our Annual Fundraising Auction in November!
- Give through Payroll Deduction.** Many employers will match funds donated through payroll deduction!
- Sponsor a Scholarship.** Talk to us about sponsoring a Scholarship or contributing toward a Community Scholarship!

Special Thanks

These local businesses provided assistance to our organization:

Walmart Crestwood for a Community Grant to support operating costs throughout the year and the Awards Ceremony.

Auction Donors: Sandy Chastain-Brough, Clothes Boutique, Crestwood Bistro, Mike DiGiuro, and Oldham County Family YMCA.

South Oldham Fire Department for supplying our meeting space throughout the year.

Pam Brown of College Prep Resources for providing space for OCCS at her public events.

Troy King of Kelly King & Co. CPAs for providing accounting services.

The Oldham County Arts Center for providing the auditorium and technical support for our Awards Ceremony.

The Oldham Era for their publication assistance throughout the year.

Karen Alsup of KMA Production for providing design of our marketing materials.

If you or your business would like to provide a special product or service for OCCS in the coming year, please contact a Board Member for details.

2024

Oldham County Community Scholarships

20th Annual Awards Ceremony

*Tuesday, May 21, 2024
7:00 – 9:00 pm*



*Dedicated to helping students in Oldham County
achieve their higher education dreams.*

occs-ky.org

2024 SCHOLARSHIPS

Thanks to all the generous scholarship sponsors who make this program possible
by donating \$141,100 to fund 135 scholarships this year.

80/20 Wealth Management.....	\$1,500
Alan Hall Agency.....	2 @ \$500
*Arts Association of Oldham County	3 @ \$5,000
Ashby Myers	\$1,000
Baptist Health LaGrange	\$1,000
Baptist Health LaGrange Medical Staff.....	\$1,000
BE KIND (Richins Family)	\$500
BE KIND FOR KENDALL (Richins Family).....	\$500
Buckner Elementary School PTA.....	2 @ \$500
Building Bridges - Tyler Gerth Memorial	\$1,500
C & W Automotive - OCHS & SOHS	2 @ \$500
Camden Station Elementary School PTO	\$500
Centerfield Elementary School PTA	2 @ \$500
Champion Chevrolet/Buick/GMC.....	\$1,000
Chase Michael Lawson Memorial	\$1,000
City of Crestwood.....	2 @ \$1,000
City of Pewee Valley.....	2 @ \$1,000
Coldwell Banker/McMahan	\$500
College Prep Resources	\$2,000
Connor Larimore Life Challenge.....	3 @ \$500
Crestwood Chiropractic - Robert Kidd Scholarship	\$500
*Crestwood Elementary School PTA	2 @ \$500
East Oldham Middle School Booster Club - OCHS & SOHS.....	2 @ \$500
East Oldham Middle School PTO.....	\$500
Empowered Women (Kimberly Foreman).....	\$1,000
*Fastline Media Group	2 @ \$1,000
*Goshen Elementary School PTA	2 @ \$500
Guns n Hoses Charity.....	2 @ \$500
Gustavo's - OCHS, NOHS, SOHS and At Large	4 @ \$500
Hagan Family.....	\$1,000
Harmony Elementary School PTA.....	\$500
Humane Society of Oldham County "Buck's Bucks"	2 @ \$500
John F. Williams Memorial (Jeff & Julie Straub).....	\$1,000
Kay Tabb Memorial Scholarship (Stoess & Associates).....	\$500
Kenwood Station Elementary School PTA	\$500
Kenwood Station Elementary School PTA (Jake Luxemburger Memorial).....	\$500
*LaGrange Elementary School PTA	\$500

Lily Fairfield Memorial.....	\$10,000
Little Piece of Heaven Farm (Tommesseti Family).....	\$1,000
Locust Grove Elementary School PTO.....	\$500
Lori Moss Memorial	\$1,000
Mahan Foundation	4 @ \$1,000; 4 @ \$2,000; 2 @ \$3,000
Mortensen Family Dental	\$1,000
Murray Vetovitz Fund - Female & Male	2 @ \$1,000
*North Oldham High School PTSA	2 @ \$500
North Oldham Middle School Booster Club - Female & Male	2 @ \$500
North Oldham Middle School PTSA	\$500
Northeast Christian Church.....	\$1,000
Oldham Chamber & Economic Development.....	\$500
Oldham County Community Scholarships - Board	3 @ \$1,000
Oldham County Education Association	3 @ \$1,000
Oldham County High School PTSA.....	2 @ \$500
Oldham County Middle School PTSA	\$500
Oldham County Schools Arts Center - Anita Davis	\$500
Oldham Farms Development	\$1,000
Oldham Lacrosse Club	\$500
Pat Shaver Memorial	4 @ \$1,000
*Pewee Valley Woman's Club	1 @ 1,100 & 2 @ \$2,000
Project Guild of LaGrange.....	2 @ \$1,000
Robyn Sutt Morris Memorial (Alex & Amy Babby).....	\$500
*Rogers Group/Oldham County Stone	\$1,000
Savannah Roberts Memorial (Roberts Family).....	2 @ \$750
Sonia's Gift (Sandy Chastain-Brough)	\$2,500
South Oldham High School Athletic Booster Club	10 @ \$500
*South Oldham High School PTSA	3 @ \$500
South Oldham Middle School Booster Club - Female & Male	2 @ \$750
South Oldham Middle School PTO	\$500
*South Oldham Rotary Club	1 @ \$500 & 3 @ \$1,000
Stephens Family (Nick Stephens)	2 @ \$500
The Oldham Era.....	\$500
Trent DiGiuro Student-Athlete (renewable) - OCHS, NOHS, SOHS.....	3 @ \$3,000
*Tri-County Ford-Mercury	\$1,000
Vaughn Petitt Legal Group	2 @ \$1,000
Warren Maggard Memorial	\$500

* Denotes 20-year sponsor with Oldham County Community Scholarships

Scholarships —for— HIGH SCHOOL SENIORS

Oldham County Community Scholarships

Dedicated to helping students in Oldham County achieve their higher education dreams.

Oldham County Community Scholarships (OCCS) is a local non-profit scholarship organization which provides Oldham County students with financial aid, encouragement and support to actively pursue higher levels of academic achievement. Scholarships are provided through local organizations, companies, and individuals. The Oldham County community rallies around those seeking higher education to give them a boost and ensure they reach their highest potential.

How to Get Involved with OCCS

Students

- Apply for scholarships that range from \$500 to \$5,000.
- Seniors register online Feb 1 at OCCS-KY.org
- Make a list of your volunteer, extracurricular activities, and jobs.
- Record contact information for your activities.
- Apply for multiple scholarships with ONE online application.
- Wait while applications are scored in March and April.
- Attend award ceremony in May.

Community Members

- Sponsor a Named Scholarship (\$500 minimum).
- Donate to the OCCS General Scholarship Fund.
- Become a Board Member.
- Volunteer on a Committee.
- Volunteer to read and score student essays in March.
- Assist with the awards ceremony.
- Help us by telling your friends, family, neighbors, and businesses about OCCS!

Businesses

- Help promote OCCS fund raisers.
- Donate to help offset OCCS operating expenses.
- Contribute to a General Scholarship (\$250 - \$499) or
- Sponsor your own Named Scholarship (\$500 minimum).

Students-did you know?

- Applications are available February 1st.
- Register online at OCCS-KY.org on Feb. 1st.
- Make changes to the application from Feb 1- Feb 28.



Like us on
Facebook

Oldham County
Community Scholarships

One application. Numerous opportunities.