

community catalyst



Oklahoma City

Community
Foundation

Helping Donors
Help the Community

September/October 1998

Thomas' lifelong love for Oklahoma City will provide for its future

❖ *The J. Edwin, Laura, Ross and Jim Thomas Family Trust will support the emerging needs of future generations of Oklahoma Citizens.*



Jim Thomas, second from left, and fellow classmates at Edgemere Elementary in the 1920s.

A new Donor-Advised Fund honors a local family which includes a former LBJ speech writer, an Oklahoma City builder and a world traveler.

Jim Thomas recently established this fund, which honors the memory of his family members.

His parents, J. Edwin and Laura Thomas, moved to Oklahoma City just a year after Oklahoma achieved statehood. They had two sons: Jim, who today is the only surviving member of the family, and his younger brother Ross, who was a successful novelist and onetime presidential speech writer.

Jim Thomas spent most of his

life in Oklahoma City. He graduated from the former Classen High School in the late 1930s, then joined the Navy and attended Rice University before graduating from the University of Oklahoma.

After college, Thomas joined his father in the residential construction business, and together they built several homes in Nichols Hills and the surrounding area. After his father died in 1960, Jim expanded the company to include commercial development and built several office buildings and churches in the Oklahoma City area.

In his spare time, Jim's passion for sports led him to coach and own a semipro baseball team known as Mid-Del in the sixties. He said he also coordinated the first Wrestling Tournament at Putnam City West High School, and helped establish the Oklahoma City Athletic Club. He also developed the first long-distance running program in Oklahoma in the early 1970s and was involved in organizing a six-sport athletic competition which today is known as the Sooner State Games.

Jim retired from the construction business in 1983 and opened a travel agency, which specialized in organizing tours across the United States and around the world for senior citizens. He recently retired and closed the agency.

Throughout his life, he has traveled extensively, but when asked where he would most like to

visit again, he replied "Oklahoma City."

Thanks to his generosity, the current and future residents of the Oklahoma City area will benefit from his gift to the Community Foundation. Though he has designated that part of his gift support several local charities,

most of the trust remains unrestricted.

It is from unrestricted gifts like the Thomas Family Trust that the Community Foundation supports its five major community programs and leadership initiatives.

Therefore, his gift will support needs and opportunities in our local community no matter what they may be 10, 20, even 50 years down the road. ❖

Jim Thomas has traveled extensively throughout his life. When asked where he'd most like to visit again, he replied "Oklahoma City."

Inside this issue:

- Once again, Kirkpatrick Challenge provides opportunity to build endowments.
- OCCF staff hit the road: Designated Endowment Fund distributions.
- Grants update: A flurry of activity surrounds the Parks and Public Spaces Initiative and After-School Options this fall.

Your Community Foundation celebrates 30 years, looks to future

Beginning in January 1999, the Oklahoma City Community Foundation will celebrate its 30th anniversary.

Its stated mission in 1969 was to help donors and non-profit organizations develop permanent endowment funds for the benefit of the community.

That mission has been pursued vigorously, and with the assistance of thousands of donors who have helped develop more than 700 permanent endowment funds, your Community Foundation now is one of the 20 largest community foundations in the nation.

While we are proud of the asset growth over the past thirty years, we are extremely grateful that we have been supported by a large and diverse number of individuals, families, businesses and charitable organizations.

We are a foundation both *of* and *for* the community.

While around \$43 million in grants to numerous organizations have been made over the past 30 years, we feel our unique contribution to the Oklahoma City area has been our leadership in several key areas:

- *Endowment management for 200+ non-profit organizations*
- *Grants to celebrate the Centennial of the Oklahoma Land Run*
- *Broad beautification efforts for parks and public lands*
- *Program support for children's activities in the non-school hours,*
- *Scholarship programs that encourage more Oklahoma County students to attend college.*

Additionally, the Community Foundation has and continues to

provide important fund management services to many charitable activities, including the recovery efforts for survivors of the April 1995 bombing of the Alfred P. Murrah Federal Building. These efforts have encouraged private contributions to many important public activities and has helped provide important resources to the community.

As we celebrate the 30th anniversary, we will be looking forward to new efforts that will involve donors, non-profit organizations and community leaders in addressing emerging needs and opportunities. You will see and hear more from us in the next year. We look forward to visiting with many of you.



...from the
Executive
Director

Community Foundation Highlights

❖ **30th Anniversary Celebration nearing** 1999 marks the 30th year that the Community Foundation has benefited the Oklahoma City area. Established in 1969 by John Kirkpatrick, the Community Foundation now ranks among the top 20 community foundations in the nation.

Watch your mail for special anniversary programs and events. Or, periodically check our web site at "www.occf.org" for anniversary news.

❖ **Fiscal Year End Highlights**

The Community Foundation distributed a record-breaking \$7.3 million back to the community in fiscal year 1998, which ended June 30.

That figure represents distributions from its community programs and from Designated Endowment Funds, Affiliated Funds, Donor-Advised Funds, Scholarship Funds, Field of Interest Funds and other permanent funds.

Investment return for the year was 20.33 percent.

The assets of the Community

Foundation reached \$314,608,528 at June 30, 1998. New contributions during fiscal 1998 totaled \$20,692,443.

The complete, audited financial statements for fiscal 1998 will be available in the Community Foundation's Annual Report, which will be published in November. Call us if you are not already on our mailing list, and wish to receive a copy of the Annual Report, at 405/235-5603.

❖ **Staff News**

PENNY VOSS joined the Community Foundation August 3 as Director of Donor Services.

Penny is a graduate of the University of Central Oklahoma and has more than 13 years experience in the development field. She most recently was executive director of the St. Anthony Hospital Foundation.

DONNA McCAMPBELL has joined our staff and will work on tax, accounting and planned giving issues as well as Affiliated Fund management. She recently left KPMG Peat

Marwick, where she was a senior manager for 11 years.

Donna is a CPA who holds a master's in accounting from OU. She also is on the board of the Oklahoma Zoological Society.

MARY RENEAU has joined the staff in a supporting position for communications and community programs.

Two other members of the Community Foundation staff have been named to volunteer leadership positions with other organizations.

DALE LEVY, Director of Community Programs, has been named to the board of the American Community Gardening Association. Dale helped organize the effort to get community gardening started in Oklahoma City.

BRIAN DOUGHERTY, who recently agreed to assist the Community Foundation on its leadership initiative involving parks and public land, has been appointed chairman of the State Board of Licensed Architects and Landscape Architects by Governor Frank Keating. ❖

John Kirkpatrick once again 'Challenges' non-profits to build endowments for their future security

❖ **Over \$2.5 million available; Largest matching funds opportunity to date.**

John E. Kirkpatrick has once again made an unparalleled offer to match gifts contributed to 189 agencies with Designated Endowment Funds at the Oklahoma City Community Foundation.

The 1998 Kirkpatrick Challenge will make \$2.5 million in total matching funds available to the agencies that have been chosen to participate.

This extraordinary offer creates an opportunity for each organization to substantially increase the value of its fund — therefore raising the level of annual support available — and to broaden its donor base at the same time. The Community Foundation publicizes these endowments and the matching opportunity to its mailing list of 12,000 and through other public relations efforts.

Each of the 189 organizations has a specific goal for meeting the matching requirements. Gifts designated for each of these agencies that are received at the Community Foundation through December 10, 1998, will be counted toward the requirements of each fund.

Mr. Kirkpatrick has long been a supporter of endowment funds for non-profit organizations and has offered several of these matching opportunities in the past. We know of no other local organization, nor any community foundation in any other state, that has the privilege of working with such a wise and generous donor in this capacity.

He believes that the best way to help an organization help itself secure a long-term future is to encourage the growth of endowment

assets. The 1998 Kirkpatrick Challenge is an incredible opportunity for non-profit leaders to provide for the future financial needs of their organization.

The Challenge is also an exciting opportunity for donors who believe in the future of the agencies they support and believe that endowments are the best way to help secure a brighter future for our children and generations to come.

Mr. Kirkpatrick helped found the Community Foundation in 1969 in part to support his vision of a stable financial underpinning for local non-profits.

Helping non-profits build endow-



Central High School Alumni Association operates this museum at One Bell Central in downtown OKC. Alumni all across the nation are supporting the endowment fund's Challenge.

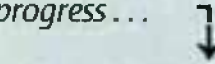
ments remains a major emphasis of the Community Foundation's mission today, nearly 30 years later.

The Community Foundation manages endowments for more than 200 non-profit agencies. The Designated Endowment Fund program provides a steady annual source of income for participating organizations, while building each fund's value for the future. (See related story on Page 4.)

The Community Foundation is extremely pleased that Mr. Kirkpatrick once again has offered such an opportunity to help non-profits build endowments for the future of the organizations, the causes they support and for the benefit of the entire community. ❖

1998 Kirkpatrick **CHALLENGE**

A Challenge is an invitation to progress...



... it requires participation.

The end result is an increase in opportunity...



... accept the Challenge.



4 simple steps you can take to help secure a non-profit's future:

1. Contact the Oklahoma City Community Foundation for a list of the 189 organizations participating in the Challenge. All of these agencies have endowment funds at the Community Foundation.
2. Select the organization(s) that you want to support and mail your contribution to the Community Foundation by December 10. Be sure to indicate which endowment fund you chose.
3. Contributions can be made in cash, appreciated securities or other marketable assets. The Community Foundation staff can help you transfer such noncash assets.
4. Contributions will be matched by John Kirkpatrick to the endowment fund(s) you chose to support. For information about any agency's matching opportunity, **contact Linda Rodriguez at 405/235-5603.**

Endowment program yields \$1.6 million for area non-profits

❖ *Annual distributions to be delivered in person to more than 200 agency boards.*

This fall, Community Foundation representatives will personally bring \$1.6 million in distributions to more than 200 non-profit organizations that participate in the Designated Endowment Fund program.

This important program has provided non-profit organizations a way to build endowment support for more than 25 years.

Through the wide spread support of many donors, the leadership of John Kirkpatrick and the participation of more than 200 organizations, the endowment program is the largest of its kind in the nation.

The program has grown rapidly in recent years, both in number participating and in market value.

As of June 30, 1998 (the end of the Community Foundation's fiscal year), the endowments have grown to a total value of \$39.1 million. Investment performance for the year was an unprecedented 20.33 percent, which gave the endowments a big boost in market value.

This year, Community Foundation officials decided to veer from the breakfast and lunch meetings traditionally held at its offices, instead opting to bring the good news (and the checks!) directly to the boards

of each organization, as part of an ongoing education and advocacy effort to raise awareness of the importance of endowments.

The Community Foundation has become Oklahoma City's specialized resource for endowment fund management.

The Designated Endowment Fund program provides three important elements for a non-profit to help secure its future:

Designated Endowment Fund Program Growth: FY1998

	FY 1997	FY 1998
Total Assets of Program:	\$31.1 million	\$39.1 million
Total Program Distributions:	\$1.4 million	\$1.6 million
Number of Funds:	231	245

1. A single endowment fund into which many donors can contribute to establish and build permanent charitable support.
2. A stable and growing annual cash distribution, meaning that non-profit executives can count on a steady income stream from the endowment fund each year when planning their budget, and,
3. Security for the future needs of the organization. Because the funds are endowments — which



The Children's Center in Bethany is one of the newer endowments at the Community Foundation.

means that the principal is protected both from spending and inflation — they provide for the future financial needs of the organization.

Because we pool endowment assets for investment purposes, small funds get the same investment returns and

management services as larger funds.

In addition, the Community Foundation serves as a partner to each agency in further building its endowment fund.

All funds are publicized to our

donors through the Annual Report, which is mailed to more than 12,000 individuals and businesses, as well as other public relations and development efforts.

The Community Foundation's flexibility is attractive to donors who contribute to endowments.

Because of the number of endowment funds we manage, donors have many choices for their contributions.

We also can accept many types of marketable assets and can easily convert them into charitable gifts.

Occasional matching programs, such as the Kirkpatrick Challenge described on page 3, also have bolstered the value of these funds and have added new names to the endowments' donor base.

By building the resources available to the non-profit organizations whose endowments we manage, we can help ensure that they will be around to serve the needs of future generations. ❖

The Community Foundation has become Oklahoma City's specialized resource for endowment fund management.

means that the principal is protected both from spending and inflation — they provide for the future financial needs of the organization.

Because the fundamental purpose of an endowment is to provide the *maximum* number of dollars to the organization it benefits *over time*,

the Community Foundation has implemented investment, distribution and administrative policies that are appropriate for long-term endowment growth.

The Community Foundation also adds value to these funds through long-term investment strategies and efficient management of the funds.

Capital preservation, protection against inflation, and long-term growth are the fundamental objec-

New endowment funds support a range of local charitable activities

CASADY SCHOOL – CAROLYN YOUNG HODNETT SCHOLARSHIP

The fund was established by Ray and Verna Young in memory of their daughter. She worked with children in a variety of ways before her death in 1991.

FRIENDS OF MARTIN PARK NATURE CENTER

Fund supports this nature center in northwest Oklahoma City.



FRIENDS OF THE OKLAHOMA HISTORICAL SOCIETY ARCHIVES

The Historical Society is dedicated to the preservation and interpretation of Oklahoma history. The Historical Society operates numerous museums and historic sites, publishes books and journals, and maintains research archives. The fund will support the historical archives division.

GUY FRASER HARRISON ACADEMY FOR THE PERFORMING ARTS

Named for a longtime director of the Oklahoma City Symphony Orchestra, the Academy provides orchestral education and performance opportunities for middle school and high school musicians.



HOUSE OF REPRESENTATIVES CAMPAIGN FOR OKLAHOMA KIDS

This fund will support programs to prevent child abuse, to benefit abused children and to raise awareness of child abuse. The Campaign was started last year by Judy Benson, Loyd Benson's wife, and Rep. Mike Mass in the wake of several high-profile child abuse cases.

LEGAL AID OF WESTERN OKLA. – JUDGE EUGENE H. MATHEWS FUND

This fund was established by Judge Mathews upon his retirement. Legal Aid is a non-profit regional law firm that provides free legal services to low-income and elderly Oklahomans.



MAKE A WISH FOUNDATION OF OKLAHOMA

The Make-A-Wish Foundation grants the wishes of children with life-threatening illnesses. They are the nation's largest wish-granting charity, with thousands of children between the ages of 2 ½ and 18 receiving wishes each year.

OKLAHOMA BAPTIST UNIV. – JAMES HURLEY ENDOWMENT

This fund supports the premed programs at OBU and was started by an alumnus in honor of James Hurley, a longtime premed adviser.

OKLAHOMANS FOR SPECIAL LIBRARY SERVICES

Fund supports the Library for the Blind and Physically Handicapped.

OKLAHOMA PILOTS ASSOCIATION – VIC JACKSON MEMORIAL SCHOLARSHIP

The Pilot's Association offers this scholarship to promote aviation education and safety and careers in aviation. The fund was named for an Oklahoma City pilot who died of cancer in 1990.



WILL ROGERS AIR NATIONAL GUARD RETIREES ASSOCIATION SCHOLARSHIP FUND

This retirees association, also called the "Gray Eagles," awards annual scholarships. The endowment will support the continuation of that effort.

ST. ELIZABETH ANN SETON SCHOOL

The fund benefits this Edmond Catholic school, which was established in 1990 and serves students in kindergarten through 3rd grade.

ST. JOHN'S EPISCOPAL SCHOOL – CALVIN AND PEOLA BATTLE SCHOLARSHIP FUND

Calvin and Peola Battle were the grandparents of four cousins who attend St. John's. The Battles were killed by the April 19th, 1995, bombing of the Murrah Building. The fund was established to assist with tuition costs for children who have suffered a crisis in their family.

ST. JOHN'S EPISCOPAL SCHOOL – EDWARD WADE-DALTON MEMORIAL FUND

This fund was established by Lola Wade-Dalton in memory of her late husband, a dedicated deacon in the Episcopal church and a supporter of the school. It was his wish to help students obtain a values-centered education. ❖

(These new endowments are all Designated Funds. Look for new Scholarship and Field of Interest Funds in the Annual Report and future newsletters.)



Quarterly grants approved by Trustees

In September, the Trustees of the Oklahoma City Community Foundation approved third quarter grants from two community programs, which totaled \$38,000.

Agency Capacity Building Program:

A Chance to Change, \$1,900, for assistance with a strategic growth and marketing plan.

Citizens Caring for Children, \$5,000, for assistance with an organizational development plan.

Exchange Club Center for Child Abuse Prevention, \$5,000, for computer hardware, software and training in order to better track and evaluate services.

Oklahoma Lions Service Foundation, \$2,250, to support a long-range plan for fundraising.

Greater OKC Tree Bank Foundation, \$2,500, for support for a long-range plan for fundraising.

After School Options:

City Arts Center, \$6,000, for assistance with an after-school arts program that will serve 12 schools.

Selecman United Methodist Church, \$3,000, to support the After School Jets program, which is a community outreach program of Selecman, Hillcrest United Methodist, and nearby communities.

After School Options: Fall activities

Now that school is in full swing, after-school programs are keeping kids occupied during the non-school hours. After School Options (ASO) is one of five community programs of the Community Foundation.

Grants and staff leadership support a broad range of positive activities for kids in the non-school hours -- all over the metro area.

For example:

Everyone Plays!

ASO staff have been actively involved in developing a 6th grade basketball program for Oklahoma City middle schools.

Looking for a way to harness prepubescent energy, several community partners have developed a program just for 6th grade boys and, this year, for girls as well.

Community partners range from churches to YMCAs to local community centers.

Elementary school kids get an EdZOOcation!

One very successful ASO program has been an after-school educational effort held in conjunction with the Zoo, Kirkpatrick Center and the Cowboy Hall of Fame.

Four northeast elementary schools rotate kids in for six-week sessions at each of these locations.

An educational curriculum is developed by each of those organizations for kids from four northeast elementary schools.

This fall, the Zoo is hosting animal-related learning activities.

The Kirkpatrick Center and Cowboy Hall of Fame each will host the program in the spring.

• For more information about After School Options, contact Sam Bowman at 405/235-4325.



After school at the Zoo

New Opportunities: A Scholarship and Guidance Network

With the inaugural class of Community Foundation Scholars hard at work at colleges across the country, other program components are in place support the goal of this initiative: To encourage more students to attend college.

Often, the key to encouraging



Internet Research

more students to attend college lies with the abilities and resources of the school's guidance counselor.

As part of this effort, the following resource grants recently have been approved:

- **Choctaw High School**, for software that provides information on college access, financial aid and career information.
- **Harrah High School**, for a copier to create student guides containing financial aid and career opportunities.
- **Jones High School**, for software that provides information on college access, financial aid and careers.
- **Putnam City High School**, to support a program training teachers to work with small groups of seniors and parents regarding college access.
- **PC North High School**, assistance for travel to nearby colleges for students who are first-generation college-bound.
- **Oklahoma Christian Schools**, for college and career resources, including computer upgrades and college access software for use in counselor-student conferences.
- **Christian Heritage Academy**, toward computer and Internet access for counselors and students to obtain college information.
- **Edmond Santa Fe High School**, for software to expand Internet services to access college, scholarship and financial aid information.
- **Bethany High School**, for curriculum and software for use with 10th graders for early awareness and college preparation. ❖

Parks and Public Spaces Initiative connecting community partners to beautify Oklahoma City

The Community Foundation has directed significant financial support and staff resources toward an initiative which will use parks and public spaces as the setting for beautification efforts, programs for youth and activities that build strong neighborhoods.

Here is an update on recent activities undertaken for this initiative:

Park Systems Study

Key parks department officials from Bethany, Edmond, Midwest City and Oklahoma City participated in a meeting in June organized by the Community Foundation, which for the first time brought staff from each of these cities together to discuss common challenges and opportunities.

In addition, interviews have been conducted by Brian Dougherty, along with Larkin Warner and Steve Smith, who are conducting the systems study, with key people involved with parks and economic development in cities that account for 95 percent of the Oklahoma County population.

The findings from these interviews will be presented to Community Foundation Trustees by year-end and will identify common concerns, highlight exemplary and innovative approaches to parks programming, beautification and maintenance problems and will suggest specific recommendations for an action plan to which the Community Foundation can bring resources and community partners.



Recent grants approved :

Partnerships between private businesses, neighborhoods, individuals and city officials are vital to enhancing the beautification and maintenance of public spaces.

A grant has been approved to Oklahoma City Beautiful, to support the expansion of the *Adopt-A-Park* program, which works to develop a such partnerships.

This expansion will include extensive community development efforts and public education about the importance of community appearance to quality of life.

Beautification of Gateways to Oklahoma City is a major focus for the parks and public spaces initiative. The Community Foundation is working with the Oklahoma Department of Transportation on two plant material tests along state-maintained highways. A grant was approved to develop vines demonstrations along I-44 and a ground cover demonstration at I-44 and Lincoln Blvd. and under the S.W. 15th St. overpass.



Beautification Summit

On September 17, a Community Appearance Summit was held to try to identify priorities for beautification of the metropolitan area.

The Summit was a collaboration between the Community Foundation, the Greater Oklahoma City and South Oklahoma City chambers of commerce, Oklahoma City Beautiful and the City of Oklahoma City.

Fifty-two community leaders representing not only Oklahoma City, but also the adjoining suburbs, participated in the summit.

Tyler Norris, a nationally recognized facilitator for community development programs, helped participants focus on a shared vision, identify community assets and create a realistic and attainable beautification plan for the metro area.

Several priorities were set for the action plan:

- Gateway beautification
- A litter control program
- A proactive landscaping program
- Preservation of historic areas
- Allocation and development of future green spaces for public use.

Smaller task forces have been formed to work on the implementation of these five priorities. ❖

Mission Statement

The mission of the Oklahoma City Community Foundation, a non-profit public charity, is to serve the charitable needs of the Oklahoma City area through the development and administration of endowment funds with the goal of preserving capital and enhancing its value for the benefit of the community.

The mission will be fulfilled by pursuit of these goals:

- Provide convenient, efficient and effective ways through which donors can contribute assets to charitable purposes.
- Encourage donors to create funds which will benefit the community both now and in the future.
- Advocate for the development of endowment funds and provide appropriate means by which permanent endowment funds can be built and wisely managed to provide long-term support.
- Develop the Funds for Oklahoma City, restricted and unrestricted community endowments, which can be used by the Trustees and the community to develop, coordinate and enhance services and programs which meet the changing needs of the community.

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Carla S. Pickrell, *Director of Administration and Assistant Treasurer*

Non-profit resources abound on the Internet

Through our work with such a large number of non-profit organizations, we try to encourage ways for as many groups as possible to share information, ideas and resources.



The Community Foundation will launch a new leadership initiative next year which will address many of these issues locally.

The following list contains web site addresses of some non-profit resource sites we found on-line. The Internet provides a wealth of resources on management and fund-raising ideas for non-profit staff and board members.

For local organizations, start with Connections at "www.connectok.com". Connections has built and linked sites for local non-profit organizations. This is a great way to see what other organizations are out there, or to start communicating via e-mail about shared challenges and opportunities.

Oklahoma City Community Foundation
www.occf.org e-mail: occf@ionet.net

Chronicle of Philanthropy
www.philanthropy.com

The Foundation Center
<http://fdncenter.org>

National Center for Nonprofit Boards
www.ncnb.org

Philanthropy Journal
www.philanthropy-journal.org

HandsNet
www.handsnet.org

The Mining Company: Nonprofit Charitable Organizations
<http://nonprofit.miningco.com>

The Non-Profit Resource Center
www.not-for-profit.org

The Grantsmanship Center
www.tgci.com

Web Sites Related to Philanthropy and Voluntarism
www.pubpol.duke.edu/courses/pps280s/index.html

Information for Nonprofits: Board and Management Questions
www.nonprofit-info.org/npofaq/03

The Learning Institute for Nonprofit Organizations
www.uwex.edu/li

Management Assistance Program for Non-profits: Non-profit Managers' Library
www.mapnp.org/library

Council on Foundations: Foundation News & Commentary
www.cof.org/foundationnews/index.html

Non-Profits Nuts & Bolts
www.nutsbolts.com

The NonProfit Times
www.nptimes.com ❖

1998 Community Program Proposal Deadlines

After School Options
October 15

Agency Capacity Building
October 15

Margaret Annis Boys Trust
October 15

Community Gardening
October 15

Fund for Oklahoma City
November 15

Contact **Susan Elkins** for guidelines, or **Dale Levy** to discuss proposals for collaborative projects, at 235-5603.

Contact **Sam Bowman** to discuss After School Options projects at 235-4325

*** Coming soon: new community program deadlines for calendar year 1999!**



Oklahoma City

**Community
Foundation**

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Cover Story:
**The Thomas
Family Trust**



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Sept/Oct 98

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