

# community catalyst



Oklahoma City

Community  
Foundation

March/April 1998

Helping Donors  
Help the Community

## Network to provide 'New Opportunities' in higher education

❖ *The goals of this initiative are to raise students' educational ambitions and to encourage more students to pursue higher education.*



Guidance counselors, who provide a direct link to students, are the cornerstone of the program.

If you've ever filled out a financial aid form or watched your child struggle with writing a college admissions essay that will distinguish them from thousands of other applicants, you know that getting into college is not always as easy as simply having good grades.

The Oklahoma City Community Foundation has recently launched a program initiative that will have far-reaching effects on Oklahoma County high school students as they plan for higher education.

*New Opportunities: A Scholarship and Guidance Network* is the name of this initiative, which seeks to motivate students to raise their post-high school educational

aspirations and to promote the growth of independent scholarship assistance in this community.

"Central Oklahoma is blessed with a range of higher education institutions that provide access to almost any type of education and training imaginable," said Nancy Anthony, executive director of the Community Foundation.

"The challenge is getting more students to take advantage of these opportunities."

The Community Foundation is embarking on a five-year program which will involve nearly \$1 million in direct financial support, not only for scholarships, but for a range of activities which will support the broader goals of the initiative.

New Opportunities encompasses four elements: a network of guidance counselors, direct scholarship assistance for students, a data collection effort and a scholarship directory.

The expectation is that the return for students will be greater than simply awarding the same resources in direct scholarship assistance alone.

A keystone to the success of the program is the *Oklahoma County Guidance Network*.

The Community Foundation invited a counselor from every public and independent high school in Oklahoma County to participate in the network.

Guidance counselors are the high school staff who work most directly with students on initial

planning for higher education. They are often a student's best resource for information about scholarships, financial aid and higher education institutions.

"What counselors have is access to students. They are the primary channel through which information about the availability of scholarships can flow," Anthony said.

"The counselors are on the front lines every day — we want to empower them with better tools to inspire students to go to college or vocational school."

Though it is

apparent that high school counselors can be key resources for students in attaining higher education, there is no formal professional association of counselors and little or no continuing education opportunities. In addition, already lean school budgets often cannot provide adequate resources for helping

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***"We want to recognize  
the good citizens . . .  
and we want to raise  
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### Inside this issue:

- Kirkpatrick Challenge strengthens endowments by more than \$800,000
- Grants update: Neighborhood Alliance gets neighborhoods connected
- Appreciated Securities: A simple way to give

## Community Foundation offers solution for scholarship administration

Establishing a scholarship fund is often a primary charitable goal for many people – they may have personally benefited from a scholarship or may have seen an important opportunity provided for their own children.

The biggest obstacle to establishing a scholarship fund usually isn't the willingness of the donor or the availability of resources, but rather a way to efficiently administer the fund.

Administration of the scholarship can be daunting if a donor wants to establish a scholarship that is independent of an educational institution or one that serves students attending a

number of schools.

The Community Foundation's *New Opportunities* scholarship program provides donors a solution to this administrative dilemma. The donor sets up the scholarship through either an endowment or with annual contributions, determines the criteria and target group to benefit from the scholarship, while the Community Foundation provides the administrative support, including application and selection procedures and payment of the award.

Because of the number of scholarship funds we currently administer, we have developed considerable expertise in

educational financial aid to help both students and donors.

By offering this scholarship administration service, the Community Foundation hopes to increase the scholarship resources available to students and to foster donor participation in providing those resources. We invite donors interested in providing scholarships to talk to us about their interests and goals. Please contact me or Anna-Faye Rose, scholarship coordinator, at 405/235-5603.



...from the  
**Executive  
Director**

## Community Foundation Highlights

### ❖ *Oklahoma City Partners Fund: New Option allows for principal spending and investment returns*

The Community Foundation is best known for managing endowment funds. However, we also offer "Pass-Through" funds (formerly known as Escrow Funds), which allow the principal of a gift to be distributed. These funds typically do not receive investment earnings and no fees are charged to the fund.

However, a new fund option, the *Oklahoma City Partners Fund*, allows for principal distributions and investment growth.

The minimum gift to establish an Oklahoma City Partners Fund is \$25,000. To allow for investment growth, no distributions can be made from the fund for 12 months from the date of the gift.

The fund will receive the same investment return as the endowment pool of the Community Foundation, with 25 percent of the fund's investment earnings directed as a permanent "grant" to the Fund for Oklahoma City in the name of the donor's fund. The remaining earnings left with the donor's fund are available for distribution along with the principal. A fee of 1 percent of the market value of the fund is charged to cover administrative costs.

### ❖ *Tree Bank provides training for Boys Trust grant recipients*

In November, the Community Foundation's Board of Trustees approved a grant to the Tree Bank Foundation of Oklahoma to provide training sessions on tree planting and landscape maintenance to recipients of Margaret Annis Boys Trust grants. The first training sessions were held in January and were also open to the public.

Now all recipients of Boys Trust grants will be required to attend a training session. The Boys Trust supports projects that beautify public lands in Oklahoma County.

"The maintenance and upkeep of Boys Trust projects has been a growing concern," said Dale Levy, the Community Foundation's director of community programs.

"What happens during the hot days of August when nobody wants to get out there and weed or water? These training sessions teach groups how to be more effective at maintaining the project on a long-term basis."

Contact Kathy Draper, Tree Bank training coordinator, at 525-7045 for more information.

### ❖ *Sixth Edition of 'Directory of Oklahoma Foundations' still available*

The directory is the most complete resource on Oklahoma's grant-making foundations and contains profiles on more than 230 foundations.

The information is compiled from the latest available 990PF tax returns filed by private foundations with the state attorney general.

Each foundation profile lists the foundation's assets, income and information about the foundations' funding interests and restrictions.

The directory also contains several indices, including a geographic listing, program area listing and trustee listing.

Cost of the directory is \$25 for up-front cash payment, or \$30 with a purchase order. Send inquiries or orders to: Foundation Research Project, P.O. Box 1146, Oklahoma City, OK 73101-1146, or call 405/235-5603.

### ❖ *New staff members*

Sharon Ammons and James Bonds have recently joined the staff of the Community Foundation. They will assist in the accounting department with fund administration, accounts payable and various other projects. ❖

# Kirkpatrick Challenge helps agencies 'double their money'

## ❖ Matching program yields more than \$800,000 for community endowments.

Non-profit agencies too numerous to count have benefited from the generosity of the John Kirkpatrick family over the last half century in Oklahoma City. Kirkpatrick's philosophy on assisting local agencies generally has been to help them help themselves.

The 1997 John E. Kirkpatrick Challenge is a prime example of his commitment to helping organizations build a stable financial base to sustain their programs.

Last October, the Oklahoma City Community Foundation announced that Kirkpatrick would match donations to 103 agencies' Designated Endowment Funds, up to \$10,000 each, through the end of 1997.

Ninety organizations rose to the challenge and raised more than \$400,000. With Kirkpatrick's matching funds, a total of \$823,962 was added to those agencies' endowment funds at the Community Foundation.

"Every organization that participates benefits from a matching offer like this," said Linda Rodriguez, development administrator for the Community Foundation and coordinator of the 1997 Kirkpatrick Challenge.

"Donors are attracted to the idea that the amount of money they are able to give will actually double."

Of the participating organizations, 21 met or exceeded Kirkpatrick's challenge to raise \$10,000. Another 15 organizations raised \$5,000 or more.

The purpose of this matching challenge was not only to build the monetary value of the agencies' endowments and increase the annual endowment earnings these organizations receive, but also to help attract a new donor base that will continue to support the work of these non-profits into the future.

"That's what is really so great about this," said Susie Graves, director of Positive Tomorrows Transitional Center. "The Kirkpatrick Challenge put us in touch with donors we didn't know before."

A remarkable 1,109 donors took advantage of this opportunity to double their investments in the community, enabling the average fund participating in the match to increase in value by 38.47 percent.

Positive Tomorrows, which provides educational and social services to school-aged homeless children, established its endowment fund at the Community Foundation just last year and was one of the top performing funds participating in the Kirkpatrick Challenge.

"It's just so exciting for us to be able to grow our endowment so quickly," Graves said.

Six agencies' endowment funds topped the \$100,000 mark as a result of the matching opportunity. They are: B'nai B'rith / Oklahoma Hillel Foundation, Edmond Educational Endowment, Red Land Council of Girl Scouts, Payne Education Center, St. John's Episcopal School and Youth Services for Oklahoma County.

"There is not another individual who has been a stronger advocate for endowment building in Oklahoma City than John Kirkpatrick," said Nancy Anthony, executive director of the Community Foundation.

"His vision and his generosity have ensured a more stable financial future for the non-profit community, which translates into a greater capacity to serve the needs of the metro area."

"Endowment is vital to our organization," said Verne Ekstrom, director of the Oklahoma Lions Service Foundation.

"It provides an underpinning of support for our entire operation," he said. "Endowment funds provide about 20 percent of our funding each year."

The Oklahoma Lions Service Foundation raises funds for the Oklahoma Lions Boys Ranch and Lions Eye Bank, which supports corneal transplantation.

Ekstrom said the endowment income helps keep the organization going even when membership rolls wane and fundraising levels are low.

Kirkpatrick founded the Oklahoma City Community Foundation in 1969 in part to support his vision of providing a stable financial base for local non-profit organizations. ❖



Positive Tomorrows Director Susie Graves points to the "Wall of Friends," on which every student leaves an indelible mark.

## 1997 John E. Kirkpatrick Challenge Results

### Lead Agencies – Amount Raised:

Jesus House .....	\$20,071
Okla. Lions Service Fdn. ....	\$11,590
Central H.S. Alumni Assn. ....	\$11,508
Positive Tomorrows .....	\$11,070
Okla. Youth with Promise .....	\$10,630

### Lead Agencies – Number of Gifts:

Crown Heights/Edgemere Heights Homeowners Assn. ....	68
Central H.S. Alumni Assn. ....	65
Okla. Lions Service Fdn. ....	60
Presbyterian Urban Mission .....	55
Edmond Educational Endowment .....	46

### Funds with Greatest Increase in Value:

Positive Tomorrows .....	387.24%
Okla. Youth with Promise .....	384.31%
Freda Poole Grayson Schol. ....	254.87%
OU School of Music – Dorothy Kendall Piano Scholarship .....	202.99%
OU School of Music – Alice Everett Cello Scholarship .....	195.98%
United Methodist Boys Ranch .....	150.86%

### Agencies that Met or Exceeded Challenge to Raise \$10,000

- Ambassadors' Concert Choir
- B'nai B'rith/Oklahoma Hillel Foundation
- Celebrations! Educational Services
- The Center for Nonprofit Management
- Central High School Alumni Association
- Chamber Music in Oklahoma
- Edmond Educational Endowment
- Jesus House
- Myriad Gardens Foundation
- Oklahoma County Bar Foundation
- Oklahoma Foundation for the Disabled
- Oklahoma Lions Service Foundation
- OU School of Music – Alice Everett Cello Scholarship
- Oklahoma Youth with Promise Scholarship Fund
- Paseo Artist Association
- Positive Tomorrows
- Rosary Catholic School
- St. John's Episcopal School
- St. John Christian Heritage Academy–Waltnine Lynette Jackson Endowment
- YMCA Central Branch
- YMCA Eastside Branch

# Fund for Oklahoma City grant gets neighbors connected

❖ *Computer resource center aids local residents in communicating with their neighbors, the city and the global neighborhood.*

Generations ago, the neighbor's picket fence was considered a communications tool.

Today, communications technologies are evolving at lightning speed. New communications tools are allowing us to connect with one another in different, often powerful, ways.

The Community Foundation recently awarded a grant to Neighborhood Alliance to fund a computer resource center that will help connect neighbors to one another, to city hall and to others interested in similar issues across the country or even around the world.

The idea for the computer center originally came from one neighborhood association that requested funds from the Fund for Oklahoma City for computer equipment to help them maintain their membership list and create newsletters and other informational pieces.

The Fund for Oklahoma City advisory committee liked the idea of helping neighborhoods take advantage of the latest computer technology, but had questions about where the computer would be located as leadership changed and whether Community Foundation resources would be effectively utilized if many of the several hundred neighborhoods in the area began to make similar, individual requests.

Community Foundation staff worked with Neighborhood Alliance to build a collaborative project that is far more encompassing than the original proposal.

Neighborhood Alliance boasts a membership of nearly 300 neighborhood associations, so it seemed like the logical place to house a computer resource center that would be accessible to all central Oklahoma neighborhoods.

"Our mission is to help build strong neighborhoods," said Debra Carmody, executive director of the Neighborhood Alliance. "We want them to use Neighborhood Alliance as a tool to get them connected — we're a connector."

A \$22,788 grant was used to equip a

computer resource center which houses several computers and printers, two digital cameras, a scanner and offers several software packages as well as Internet connection.

A portion of the funding was used to hire two part-time staffers who are available at the computer center in the evenings and on weekends to train neighborhood residents and even to help them create a work plan for the communications goals they want to meet.

"What's really made this project work is the training component," said Dale Levy, director of the Community Foundation's community programs. "People come together for the training sessions and interact with one another, then they in turn can train others in their neighborhoods."

American Online has donated Internet service for the facility, and has offered to help individual neighborhoods create Web sites. Carmody hopes that one day soon older members of neighborhood associations will be working side by side with younger, more computer savvy residents to create Web sites or do research on the Internet.

"Eventually, we hope that they will use the

Internet to find out how other neighborhoods are solving crime problems, raising money or other issues that face all neighborhoods," said Steve Morris, part-time resource coordinator for the computer center.

The police department and the city's neighborhood enhancement department have indicated that they are willing to provide crime statistics and other information such as code violations to residents via modem.

In addition to the online capabilities, the software provided at the computer resource center can aid users in everything from desktop publishing to database management, from creating billing statements for membership dues to hosting a tool lending library.



Steve Morris demonstrates software that is available at the computer resource center. He works part time at the center training users.

More than 50 neighborhood associations have indicated that this technology was sorely needed, according to a survey done by Neighborhood Alliance.

In fact, during a series of neighborhood summits in 1996, communication was identified by residents as the number one area of concern for neighborhoods; crime was third.

"I was surprised that they identified communication as the top priority," Carmody said. "You hear so much about crime — politicians talk about it all the time."

"Crime is definitely an issue, but the truth is that crime rates are decreasing. However, without communication, nothing will succeed." ❖

The Fund for Oklahoma City is one of the community programs administered by the Community Foundation.

The Fund for Oklahoma City emphasizes the development of programs that involve collaboration among non-profit organizations, address a community need in a strategic way or improve the overall infrastructure for community service providers. There are no specific areas of interest, but the project must involve multiple organizations in a true collaboration.

For more information, contact the Community Foundation offices at 405/235-5603.

# Five community programs support a range of needs

The following grants have been approved by the Trustees of the Community Foundation for the past three quarters.

## ❖ AFTER SCHOOL OPTIONS

**Boys and Girls Club of Okla. County**, \$5,000, (9/97), for development of a new Boys and Girls Club at Taft Middle School.

**Capitol Hill Church of God**, \$5,760, (9/97), for staffing assistance with "Latch Key Ministry" before- and after-school program for children in kindergarten through sixth grade.

**Community Oklahoma on the Water**, \$5,000, (9/97), for expansion of an after-school Interscholastic Sailing Program for sixth and seventh graders from four schools.

**Salvation Army Boys and Girls Club**, \$2,500, (9/97), for staffing assistance with the Webster Middle School TeenSupreme after-school program.

**Care Center**, \$3,680, (11/97), support for the WHIZ Kids program, which connects 12 inner-city churches with nearby schools and provides a nationally recognized curriculum.

**Immanuel Lutheran Church**, \$1,500, (11/97), for development of an after-school program at this church which has run a successful summer program.

**Southminster Presbyterian SPARK**, \$750, (11/97), for continued staffing support for this recently expanded program.

**Westminster Presbyterian SPARK**, \$2,000, (11/97), for program enhancement through instruction by City Arts Center artists-in-residence.

**Young Life**, \$4,769, (11/97), for sound equipment at the new Performing Arts Academy in the Paseo Art District, which will involve nearby middle school children.

## ❖ AGENCY CAPACITY BUILDING

**Greater OKC Tree Bank Foundation**, \$2,500, (9/97), for assistance with activities leading to development of an agency vision and a strategic plan.

**OKC Public Schools Foundation**, \$2,500, (9/97), for upgrading the existing operating system and purchasing new computer equipment for the organization.

**Presbyterian Urban Mission**, \$2,500, (9/97), for assistance with updating and networking a computer system to track services, funds and program objectives.

**Red Earth**, \$2,500, (9/97), for assistance with a marketing analysis and economic impact study of the Red Earth Festival.

**Lyric Theatre**, \$5,000, (11/97), support for a new Box Office System for Lyric Theatre.

**Salvation Army Boys and Girls Club**, \$2,500, (11/97), for assistance with creating a development plan for the agency.

**Retired and Senior Volunteer Program**, \$5,000, (2/98), for hardware and software upgrades for the agency's computers.

**Prairie Dance Theatre**, \$1,500, (2/98), for development of a strategic plan.

**St. John Christian Heritage Academy**, \$4,335, (2/98), for assistance in purchasing a computer and other materials for a Media Center at this parochial school.

**American Red Cross, OKC Chapter**, \$1,500, (2/98), for a computer for the Volunteer Center, which allows potential volunteers with no Internet access to pursue volunteer opportunities.

**Kirkpatrick Science & Air Space Museum**, \$5,000, (2/98), for costs associated with the development of a long-range plan for the newly merged organization.

## ❖ FUND FOR OKLAHOMA CITY

**Prairie Dance Theatre**, \$3,115, (11/97), for the *Wilson School Initiative*, which will provide dance and creative movement activities for children and will integrate performing arts into the curriculum.

**St. Anthony Hospital Foundation**, \$10,000, (11/97), for support for the *Parish Nurse Program*, which will provide health education on a neighborhood level in northwestern Oklahoma City.

**Seeworth Preparatory School**, \$16,000, (11/97), for support for this alternative school for adjudicated and at-risk youth.

**Tree Bank Foundation of Oklahoma**, \$13,570, (11/97), for a tree maintenance and gardening training program, which is now required for participants in all beautification and gardening projects funded by the Community Foundation.

**Regional AIDS Interfaith Network**, \$15,000, (11/97), for support of the *HIV/AIDS Action Initiative*, which focuses on prevention, education and on developing compassionate responses from the African-American faith community.

**Oklahoma County Medical Society**, \$15,000, (11/97), support for *Schools for Healthy Lifestyles*, an effort to reduce substance abuse and chronic disease.

**Arts Council of Oklahoma City**, \$25,000, (2/98), assistance with *Stage Center Presents*, a new effort of five local theatre companies performing together in six productions at Stage Center.

❖ **MARGARET ANNIS BOYS TRUST City of Del City**, \$2,000, (11/97), for planting wildflowers at the Del City Ball Park Complex and on other public land.

**Shalimar Neighborhood Watch Assoc.**, \$1,000, (11/97), for planting trees and perennials in four beds along I-40.

**City of Oklahoma City / Pennville Neighborhood Association**, \$3,000, (11/97), for assistance with a beautification project at the Youngs Boulevard median, south of NW 23rd Street.

**OKC Public Schools Foundation**, \$1,715, (11/97), for plant materials for the *SchoolScape* program at Shidler Elementary.

**Reed Park Neighborhood Association**, \$2,770, (11/97), for assistance with a beautification project in Reed Park, at NW 12th Street and May Avenue.

**St. John's Episcopal School**, \$5,000, (11/97), for assistance with a project to beautify Deep Fork Creek area and to create an outdoor agriculture and wildlife learning environment for the school.

**Tree Bank Foundation of Oklahoma**, \$9,970, (11/97), for support of the "Leaf it to Me" School Arboretum Program at 12 schools in Oklahoma county.

**Campbell Park Project**, \$1,000, (11/97), for the Lillian Frances Meador Bulb Garden at N.W. 13th Street and Broadway Avenue.

**Arts Council of Oklahoma City**, \$10,000, (2/98), for beautification of Festival Plaza, the area between the Arts Council, McAlpine Center and Stage Center, which is the site of the annual Festival of the Arts.

**OKC Metro Alliance for Safer Cities**, \$6,500, (2/98), for a beautification project at *First Step*, an alcohol rehabilitation program.

**Lake Hefner Boat Owners Association**, \$7,185, (2/98), for beautification of three marina dock entrances and to develop two public park areas at Lake Hefner.

**OKC Public Schools Foundation**, \$6,224, (2/98), for *SchoolScape* projects at Arthur, Heronville and West Nichols Hills elementary schools.

**Overholser Elementary School**, \$1,355, (2/98), to develop a butterfly garden at the school.

❖ **COMMUNITY GARDENING Jackson Neighborhood Association**, \$1,983, (11/97), for a community garden located at S. Youngs and 24th Street.

## Donors look to the future through scholarship funds

The Oklahoma City Community Foundation administers a range of scholarship funds. Many donors establish scholarships in memory of a loved one or to benefit a student at the school they or their children attended. Donors who establish scholarship funds know that their support will truly help create a better future for its recipients. Here are a few of the newest scholarships established at the Community Foundation.



### ALBERT AND FREDA MAROTTEK SCHOLARSHIP FUND

Freda Marottek established this scholarship fund in memory of her husband, Albert. The couple were charter members of St. James Catholic Church, and many parishioners have also contributed to the scholarship fund. The fund will support need-based scholarships for families who are active in the church or its parochial school.

Albert worked at Tinker Air Force Base for 40 years. Freda worked at Reed Tool Company for 42 years and volunteered at St. James School after her retirement.

The Marottek's did not have any children of their own; the scholarship is Freda's way of perpetuating their love of children.



### TRACY WILSON SCHOLARSHIP FUND

The initial contributions for this scholarship fund were given by the Knights of Columbus from a fund initially set up to help pay for Tracy's medical care and funeral costs after the 20 year-old college student was fatally injured in an automobile accident in 1997.

At the time of his death, Tracy was starting his third year at Northeastern State University in Tahlequah. Tracy's parents set up the scholarship fund to help other families receive the same firm foundation in education that he received at St. James School.

The scholarship will be administered by the Community Foundation and will provide tuition assistance for families of St. James.



### CAROLYN YOUNG HODNETT SCHOLARSHIP FUND

This scholarship fund was established by R.A. and Verna Young in memory of their daughter, who passed away in 1997.

Mr. Young was one of the founders of the local retail chain TG&Y.

Carolyn Young Hodnett grew up in Oklahoma City and graduated from Casady School. She went on to attend Wellesley College, Union Theological Seminary and Columbia University.

For many years, she taught remedial reading to children with special needs.

The scholarship fund will benefit students attending Casady School.

## Long-established scholarship programs withstand the test of time

The Community Foundation administers scholarship and award funds for individual donors, non-profit organizations, service groups and corporations.

The first scholarship fund, the **Scholarship Endowment**, was established just a year after the Community Foundation itself was formed.

More than 200 students have received assistance from this unrestricted scholarship fund over the last 10 years.

The fund has helped establish a program giving children in foster care an opportunity for college or vocational training. It has also supported National Merit Scholarships and Advanced Placement Scholarships to encourage

academic achievement.

The foster children's scholarship program has evolved into **Oklahoma Youth with Promise**, which is now being operated under the umbrella of New Opportunities. The fund has been added to by the Nichols Hills Plaza Scholarship Foundation and the Willie Elizabeth Shipley Trust.

Another longtime fund, the **Dana Corporation Scholarship**, has shown what good stewardship can add to the value of a donor's original contribution.

The fund was established through a \$50,000 contribution from the Dana Corporation Foundation to provide educational assistance for dependents of

employees at its Oklahoma City manufacturing plant.

The fund has awarded \$27,000 in scholarship assistance to 19 students since the fund was established in 1988.

What began with a \$50,000 initial contribution has since grown through investment performance into a fund valued at more than \$100,000 — with no further contributions.

The Community Foundation also administers the **Survivors' Education Fund**, which was established to provide educational assistance to children affected by the 1995 bombing of the Alfred P. Murrah Federal Building.

More than \$7 million was contributed by donors nation-wide to ensure that these children are mentally, emotionally and physically able to attend college or vocational school. ♦

# 'New Opportunities'

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students fully explore the best possible educational options after high school.

The Guidance Network kicked off at the Community Foundation on February 26 with the first-ever county wide training opportunity, which included a workshop presented by the Oklahoma State Regents for Higher Education.

The New Opportunities program was introduced to counselors by Community Foundation staff, who outlined the investments and dividends associated with participation in the network.

In return for their time distributing scholarship information to students, attending training sessions provided by the Community Foundation and gathering key data on each graduating class, counselors will receive professional enrichment and peer support, additional resource materials that will be made available through grants from the New Opportunities program, and a \$1,000 scholarship for at least one graduating senior at their school.

Through the enhanced efforts of the Guidance Network, the program is designed to impact all students in Oklahoma County, even though the Community Foundation can presently provide a finite number of direct scholarships.

Sixty *Community Foundation Scholar* awards of \$1,000 will be presented in May to Oklahoma County high school seniors who demonstrate an ability to benefit from higher education.

Recipients of the awards will be chosen by review committees at each high school participating in the Guidance Network.

"We want to recognize the good citizens — who are committed to education, who are participating in activities at their school or in their community — and we want to raise their expectations about where they can go to school," said Anna-Faye Rose, director of scholarship programs at the Community Foundation.

Criteria for the awards have been developed to reach those students who have good grades or do well on college entrance exams, but do not qualify for other academic or performance-based scholarships, such as musical or athletic awards.

"Many students and parents perceive that scholarships are only for the top 1 or 2 percent of students, and that financial aid is only for those who truly need it,"

Rose said. "We want to provide incentive for the *good* students to really look at what their options are."

One measure of the effects of the New Opportunities program will be a data collection effort involving each school participating in the network.

Each member of the Guidance Network will track data on graduating seniors and whether they attend college or vocational school and if they received financial aid or scholarships.

The purpose of this data collection effort is to document the availability of financial assistance to high school students and to understand how it affects students' decisions about the type of educational institution they attend.



**Guidance counselors are often a student's best resource on information about scholarships, financial aid and higher education institutions.**

In addition, the Community Foundation will solicit information about local independent scholarships from counselors and from the general public and will compile this information into a directory which will be printed and placed on the Internet this fall.

The directory demonstrates the Community Foundation's commitment to making information about scholarships more accessible to all students in the metro area.

The Community Foundation will also continue to promote the establishment of additional scholarship support in the community.

The Community Foundation's administrative services provide a direct link between donors and the students they wish to support.

While the initial efforts of New Opportunities are concentrated in Oklahoma County, the Community Foundation hopes that what is learned and what is accomplished through this program and through other donor-initiated scholarships will resonate throughout Oklahoma. ❖

## 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 Oklahoma City area.

*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.

## Staff

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James Bonds, *Staff Accountant*  
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# Appreciated Securities: A Simple Way to Give

Gifts of many types of assets to the Community Foundation are simple to make and can benefit a variety of purposes. A single gift can be used to support several non-profit organizations or charitable causes.

Contributions can be directed into a permanent endowment fund, with distributions made from investment earnings, or a "pass-through" fund, in which the principal is distributed.

The tax benefit is realized in the year of the gift, yet income from the fund can be distributed to specific causes or charities at almost any time in the future.

- A gift of appreciated stock is one of the best gifts a donor can make in terms of tax savings.

With the stock market hitting all-time highs, the value of stocks held in many portfolios has increased significantly. By giving this type of asset, a donor can realize significant tax savings, while maximizing the charitable benefit.

- Gifts of long-term capital gain assets are deductible at fair market

value, subject to a 30 percent of Adjusted Gross Income ceiling. Donors to private foundations can claim the same tax break for gifts of publicly-traded securities until June 30, 1998, after which they will be deductible at cost basis. All other forms of appreciated property contributed to a private foundation are deductible at cost basis only.

- In addition, by gifting this type of asset, the capital gains tax is avoided. Donating highly appreciated securities allows all of a donor's capital gains to stay in this community as charitable dollars — rather than sending 20 percent of the appreciation to Washington, D.C.

- Giving a gift of appreciated securities is an especially easy way to give to the Community Foundation. We maintain accounts at several brokerage firms and will open an account anywhere for any donor.

Transferring appreciated stock can be as easy as picking up the telephone. Call us to find out more about this tax-saving option. ❖

## Is your broker on this list?

Prudential Securities Inc.  
Goldman, Sachs & Co.  
Merrill Lynch  
Dean Witter Reynolds Inc.  
PaineWebber  
Charles Schwab & Co. Inc.  
Capital West Securities  
Smith Barney

If not, contact Carla Pickrell, director of administration, at 405/235-5603 and we'll set up an account for you. It may just be the easiest charitable gift you've ever made.

## 1998 Community Program Proposal Deadlines

**After School Options**  
*April 15, July 15, Oct. 15*

**Agency Capacity Building**  
*April 15, July 15, Oct. 15*

**Margaret Annis Boys Trust**  
*April 15, Oct. 15*

**Community Gardening**  
*April 15, Oct. 15*

**Fund for Oklahoma City**  
*August 15, Nov. 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.



Oklahoma City

**Community  
Foundation**

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405/235-5603

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