



Kirkland Hall
President, Board of Trustees



Nancy B. Anthony
Executive Director

Dear Donors:

As a valued donor to the Oklahoma City Community Foundation, we are pleased to provide you with the 2008 Donor Report. This publication provides a snapshot of our fiscal year investment performance and offers information about giving opportunities.

While our investment return for FY2008 was -3.23 we strongly believe that our focus on a diversified investment portfolio combined with a prudent distribution policy allowed us to have a stronger year than many others. It is important to note that because the distributions for most of our permanent funds are based on an 8 quarter average market value, most of the cash distributions for 2008 will be higher than in 2007. Both the investment policy and distribution policy are included in this report.

In addition, your 2008 Donor Report includes the FY2008 fund value and annual distribution amounts for the 285 charities who participate in our Charitable Organization Endowment Program. Similar information is also listed for the more than 80 scholarship and award endowments we administer. It is important for you to know that your support through previous and current gifts to these endowments provides the organizations with an annual source of income and will for perpetuity.

We hope you find the 2008 Donor Report informative. Please do not hesitate to contact us with any questions. Thank you for your continued support.

A handwritten signature in blue ink that reads "Kirkland Hall".

Kirkland Hall
President

A handwritten signature in blue ink that reads "Nancy B. Anthony".

Nancy B. Anthony
Executive Director

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High quality diversification reduces total portfolio risk

Diversification is a cornerstone of modern portfolio theory and allows better management of the risk involved with higher return assets. In FY2008, the Oklahoma City Community Foundation maintained its diversification between equity and fixed income investments and added to international stocks to broaden its asset allocation. While fixed income investments are often viewed as having little potential for much return over inflation, the safe harbor was very welcoming in a volatile market.

David Swenson, the well-regarded manager of the Yale Endowment, recently wrote, "Long-term bonds play a diversifying role in institutional portfolios, providing steady, reliable streams of income to investors. The security provided by bond investments becomes particularly significant in times of financial crises, when investors embark on a flight to quality, seeking to hold only the most secure, most liquid assets." Swenson would recommend that high quality is essential to diversify equity risk.

For the Oklahoma City Community Foundation's General Investment Pool, FY2008 was a year where the diversification of a very high quality bond portfolio accomplished both the goal of continuing a steady source

of investment performance and providing significant out-performance at a time when the overall national financial markets were under significant stress. The Investment Committee revised and strengthened the fixed income policy during the year, allowing the managers a broader range of fixed-income options but maintaining quality criteria that proved to be very rewarding.

Our allocation of 32-35 percent to fixed income probably has dampened long-term total returns in some of the past years, but in each year with a negative equity return, the fixed income return was between 7.8 and 10.8 percent. While equity returns have varied between -14.4 and +29.8 since 1999, the fixed income portfolio has a positive return during each of the past 10 years.

Swenson sums up the case for diversification, "By creating portfolios of a variety of asset types, investors diminish the risk that an undiversified exposure to a single market will cause significant damage. If the strategy succeeds, portfolios generate high expected returns with low levels of risk."

Investment Performance Highlights

TOTAL RETURN	Year Ended June 30, 2008	Three Years Ended June 30, 2008	Five Years Ended June 30, 2008	Ten Years Ended June 30, 2008
Oklahoma City Community Foundation	-3.23%	5.52%	7.76%	5.40%
S&P 500/Lehman G/C Int *	-5.94%	4.63%	6.37%	4.15%

* Composite benchmark indices based upon applicable asset allocation.

Pooled Investments Performance Summary

Manager	% of Total		Rate of Return	Year Ended	General Pool Rate of Return	Composite Indices (Note A)
	Portfolio	% of Asset Class	Year Ended			
	June 30, 2008	June 30, 2008	June 30, 2008	June 30, 2008		
EQUITY				June 30, 2007	13.68%	15.40%
LARGE CAP VALUE				June 30, 2006	6.82%	5.54%
Wedge Capital Management	7.04%	11.81%	-17.79%	June 30, 2005	7.52%	5.76%
Barclays Russell 1000 Value Index Fund	5.08%	8.51%	-18.67%	June 30, 2004	15.03%	12.39%
Russell 1000 Value			-18.79%	June 30, 2003	5.28%	3.96%
LARGE CAP GROWTH				June 30, 2002	-5.58%	-8.83%
Barclays Russell 1000 Growth Index Fund	15.87%	26.61%	-5.79%	June 30, 2001	-5.65%	-5.78%
Russell 1000 Growth			-5.96%	June 30, 2000	10.30%	6.19%
SMALL/MID CAP VALUE				June 30, 1999	12.51%	16.26%
Earnest Partners	4.33%	7.27%	-9.54%	Ten Years	5.40%	4.15%
Russell 2000 Value			-16.19%	Compounded (Note A)		
SMALL/MID CAP GROWTH						
Columbus Circle Investors	5.35%	8.98%	9.36%			
Russell 2500 Growth			-9.20%			
INTERNATIONAL						
Barclays EAFE Index Fund	4.85%	8.14%	-8.04%			
MSCI EAFE (US\$) Net			-10.61%			
Barclays Emerging Markets Index Fund	2.53%	4.24%	8.05%			
MSCI EMF (Gross) Index			4.89%			
CORE						
Barclays Russell 1000 Index Fund	10.93%	18.33%	-13.18%			
Russell 1000			-12.37%			
Kalmar Investments	3.63%	6.09%	-6.57%			
Barclays Russell 2000 Index Fund	0.01%	0.02%	-15.69%			
Russell 2000			-16.19%			
TOTAL EQUITIES	<u>59.61%</u>	<u>100.00%</u>	-9.24%			
S&P500 Stock Index			-13.11%			
FIXED INCOME						
JPMorgan	20.53%	58.41%	8.13%			
Bank of Oklahoma	13.91%	39.56%	7.38%			
Barclays 1-3yr. Treasury Bond Index Fund	0.71%	2.03%	7.83%			
TOTAL FIXED INCOME	<u>35.15%</u>	<u>100.00%</u>	7.82%			
Lehman G/C Int. Index			7.39%			
Lehman 1-3 Govt			7.08%			
CASH						
JPMorgan Money Market Fund	<u>5.24%</u>		NA*			
TOTAL POOLED INVESTMENTS	<u>100.00%</u>		-3.23%			
Composite Indices						
65% S&P500 / 35% Lehman G/C Int.			-5.94%			

Note A: Equity performance is compared to the Standard and Poor's 500 stock index (S&P500); fixed income performance is compared to the Lehman Government/Credit Intermediate bond index (Lehman G/C Int.); and total return is compared to the composite of these indices with weighting based upon applicable asset allocation. For the past 10 years, the allocation benchmark has been 65% equity and 35% fixed income.

Notes: Investment managers are measured against the index selected for that manager's specific style with the overall performance of the equities being measured against the S&P500 stock index. All performance returns are gross of management fees and custody/transaction charges and net of sales commissions.

Large investment pool provides advantages

An investment program with assets of \$563 million benefits all endowments at the Oklahoma City Community Foundation. Even the smallest charitable organization endowment or scholarship fund reaps the benefits that a large investment pool provides at a cost that is significantly below normal investment management fees.

Our investment program benefits from its very low-cost and efficient operation. By balancing the use of active managers and index funds in a way that maximizes the opportunity for adding value but keeps the cost low, we have been able to produce annualized returns over 10 years that exceed the markets but at a cost which is much lower than mutual funds or other balanced fund alternatives. For FY2008, the cost of investments at the Oklahoma City Community Foundation was 37 basis points, compared to more than 100 basis points for the average mutual fund or active equity fund manager requiring a large minimum account.

For a \$50,000 fund that returns 8 percent over a 10-year period, this cost difference means approximately \$6,400 more in value to the fund. Over a 20-year period, the fee difference can amount to \$26,000 or more of added fund value over the alternatives who charge a significantly higher investment fee.

Diversification is a hallmark of a solid endowment investment policy and is one of the greatest advantages these funds receive. The general investment pool is invested in all classes of domestic equities, in a range of fixed income securities and also has exposure to international markets. We provide a "balanced" portfolio by allocating assets to highly qualified managers in a wide-range of investment classes. Due to the size of our investment pool, this level of equity exposure is available so that even the smallest funds benefit.

All Oklahoma City Community Foundation investments are overseen by an active committee of community leaders with strong investment expertise and are led by Hotchkiss Associates, LLC, an investment counsel firm based in Chicago, Ill. All funds benefit from the expertise of this committee and their efforts to provide the best investment product at the most efficient price.

For many years, the Oklahoma City Community Foundation has been the leading advocate for building endowment funds in the community. Utilizing a large investment pool that allows us to keep fees low is one of the greatest advantages the Oklahoma City Community Foundation provides to charitable organization endowments.

2007-08 Investment Committee

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Trustee, Oklahoma City Community Foundation
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Cardinal Engineering

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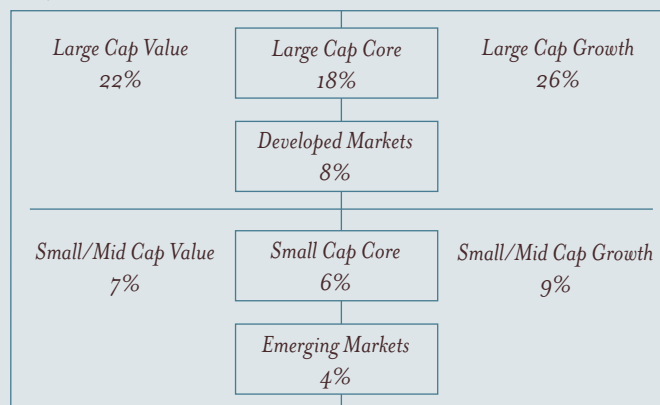
Trustee, Oklahoma City Community Foundation
Attorney

Investment Counsel

Hotchkiss Associates, LLC
303 W. Madison, Suite 1050
Chicago, Ill. 60606

Asset Class Target Percentage Allocation

As of 6/30/08



Asset Allocation Model - General Pool

	Target	Range
Equity	62.5%	40-70%
Fixed Income	32.5%	30-60%
Cash	5.0%	0-10%

Targeted Asset Class Ranges

Large Cap Value	12-24%	Small/Mid Cap Value	4-16%
Large Cap Growth	12-24%	Small/Mid Cap Growth	4-16%
Large Cap Core	20-48%	Small Cap Core	7-24%
Developed Markets	0-10%	Emerging Markets	0-5%

For Investment Definitions see page 2.

Investment Definitions

Growth Stock | Shares of a company that is growing earnings and /or revenues faster than its industry or the overall market. Typically, these companies pay little or no dividends, preferring to use income to finance further expansion. Growth stocks tend to have higher P/E ratios than the overall stock market because investors expect future earnings growth will be higher than it is currently.

Value Stock | A stock that appears undervalued relative to the value of its assets. A stock may be a "buy" as a value stock if its cash per share (or its book value) is high relative to its stock price. P/E ratios tend to be below growth stocks and the markets because investors expect future earnings growth to be less than it is currently. Dividend yields tend to be relatively high.

The Core Equity style | Designed to produce a market rate return with similar volatility (risk). This makes for a consistent investment strategy that is unaffected by short-term investment style themes such as growth vs. value. These assets are characterized by low stock turnover and low transactions cost. Core equity investing is a prudent way to preserve assets while at the same time participating in the long-term growth of the economy. Both large cap and small cap core equity investments are utilized.

Definitions of large, mid and small market capitalization vary, but could be reasonably considered as: **small cap** - less than \$1 billion; **mid cap** - greater than \$1 billion but less than \$5 billion; **large cap** - greater than \$5 billion.

Price-to-Earnings (P/E) Ratio | A stock's price divided by its earnings per share, used as a method of valuation.

Market Capitalization | Stock price multiplied by shares outstanding.

Distribution Policy Benefits Endowment Funds

Of primary importance to any endowment program are prudent distribution policies that will over a long-time horizon produce the maximum number of dollars for charitable causes or organizations. Spending rules are commonly used to provide a structured method of making distributions from an endowment fund that protects the distribution stream from inflation, provides a predictable annual distribution and allows the Investment Committee to focus on maximizing total investment return.

Since 1989, the Oklahoma City Community Foundation has employed a distribution policy that is designed to permit funds to capitalize on good investment years as well as protect in the event of a low or negative return market. The experience of the past few years, where returns were on both extremes of investment performance, have proven the wisdom of a policy which stabilizes the effects of market conditions on distributions from an endowment.

Cash distributions from most of the endowment funds of the Oklahoma City Community Foundation are based on a spending policy that calls for distributing 5 percent of the fund's average market value. The remaining investment return is left with the fund to add to the value, which protects the future distribution stream from inflation.

The annual distribution from the fund is more predictable because the amount is not tied to current income, which fluctuates due to shifts in market conditions, but is based on a rolling quarter average of the fund's market value, adjusted for additional contributions. The number of quarters used in the average ranges from 8 to 20, depending upon the type of fund.

"Large educational and institutional endowment managers across the country seem to agree that an amount close to 5 percent of the average market value is a safe amount to spend and still provide protection for the principal," says Carla Pickrell, director of administration for the Oklahoma City Community Foundation.

The experience of the past few years, where returns were on both extremes of investment performance, have proven the wisdom of a policy which stabilizes the effects of market conditions on distributions from an endowment.

The 5 percent figure is based upon an estimate of two factors over time: market return and inflation. A conservative prediction of average market return in a balanced fund over time is 8 percent. It is widely expected that inflation will average 3 percent over time. This leaves 5 percent to spend while still protecting the fund's value for the future. The Investment Committee's focus on long-term fund growth allows for a bias to equities in the asset allocation.

While there are other approaches to determining distributions, the 5 percent spending rule does not require a specific investment allocation to income-producing assets and is not subject to short-term market fluctuations. Investment managers are able to focus on achieving the best total return.

"The total return concept is especially important because of this active goal of growing endowment funds," Pickrell says. "There is an available annual distribution of 5 percent from the endowment that is increasing in value over time even if there are no additional contributions to the fund."

Charitable Organization Endowment Funds

Following are the charitable organization endowments at the Oklahoma City Community Foundation from which an annual distribution is made to the beneficiary organizations. The first column lists the fund value as of June 30, 2008 while the second column gives the total distribution amount for the year. In most cases, the distribution amount is based on 5 percent of the average market value of the fund over the previous 8 quarters. Affiliated funds may have different distribution policies based upon the documents that govern those funds.

Arts & Culture

Name	Market Value 6.30.08	FY2008 Distribution
Allied Arts Foundation	1,088,790	49,496
Ambassadors' Concert Choir	129,678	6,920
Arts Council of Oklahoma City	353,617	15,141
Ballet Oklahoma	194,408	10,494
Canterbury Choral Society	191,979	10,363
Chamber Music in Oklahoma	169,112	8,755
-Berrien Kinnard Upshaw Chamber Music Fund	50,732	2,739
Cimarron Circuit Opera Company	126,673	6,838
City Arts Center	1,618,778	86,976
Civic Music Association	208,612	10,721
Fine Arts Institute of Edmond	109,256	5,844
Guy Fraser Harrison Academy for the Performing Arts	60,271	3,230
Individual Artists of Oklahoma/ Linda Jaeger Memorial	44,736	2,413
International Photography Hall of Fame & Museum	418,177	22,573
Jacobson Foundation	66,918	3,607
Jazz in June	28,152	792
Ladies Music Club of Oklahoma City	45,280	2,418
Lyric Theatre of Oklahoma	1,268,291	49,036
-Curt Schwartz Scholarship	90,463	4,875
Melton Art Reference Library	53,479	2,887
-Scholarship Fund	49,124	2,651

Name	Market Value 6.30.08	FY2008 Distribution
Jasmine Moran Children's Museum	100,923	4,977
National Cowboy & Western Heritage Museum	1,397,689	24,000
National Cowboy & Western Heritage Museum/ Docent Council	18,963	1,025
OK Chorale	28,679	1,375
Oklahoma Arts Institute	240,537	12,755
Oklahoma Children's Theatre	84,419	4,438
Oklahoma City Museum of Art	6,847,294	289,619
Oklahoma City Orchestra League	364,858	19,695
Oklahoma Community Theatre Association	18,089	969
-Lil Williams Festival Fund	19,323	1,043
Oklahoma Museums Association	89,078	4,098
Oklahoma Philharmonic	3,426,347	83,000
Oklahoma Shakespeare in the Park	65,025	3,502
Oklahoma Visual Arts Coalition	59,913	2,560
Oklahoma Youth Symphony	26,948	1,455
Paseo Artists Association	66,715	3,500
Prairie Dance Theatre	103,087	5,554
Red Earth	181,747	9,809
-Kathleen Upshaw Fund	16,845	909

Community Development Organizations

Association of Fundraising Professionals	20,929	1,115
Cimarron Alliance Foundation	19,325	1,042
Crimestoppers of Oklahoma City	82,753	4,467

Name	Market Value 6.30.08	FY2008 Distribution
Executive Service Corps of Central Oklahoma	19,146	405
Executive Women International	137,080	7,399
Impact Oklahoma	20,000	*
Jewish Federation of Greater Oklahoma City	247,398	13,304
-Ralph Dorn Fund	222,094	10,500
Junior Hospitality Club	184,842	9,978
Junior League of Oklahoma City	246,220	13,287
Kiwanis Club Special Activities	60,393	3,260
Leadership Oklahoma City	1,037,352	52,250
League of Women Voters of Oklahoma	44,584	2,396
Legal Aid Services of Oklahoma		
-Judge Eugene H. Mathews Fund	62,751	2,921
-Stan Foster Senior Law Fund	12,048	659
Midwest City Rotary Foundation	*	*
National Society of Colonial Dames of America in Oklahoma	196,408	10,593
The Ninety-Nines	81,450	4,397
99s Museum of Women Pilots	26,793	1,441
Oklahoma Center for Nonprofits	133,623	7,213
Oklahoma City All Sports Scholarship Relief Fund	47,034	2,539
Oklahoma City Boathouse Foundation	41,840	1,142
Oklahoma County Bar Foundation	240,316	11,542
Oklahoma Lions Service Foundation	163,764	8,840
Redbud Foundation	38,725	1,994
Rotary Club 29 Foundation	221,377	11,950
U.S. Navy-E6A Squadron/Tinker Air Force Base	56,103	5,982
USS Oklahoma City	65,603	6,996
Women of the South	20,903	1,129

Education: Community Organizations

Friends of the Metropolitan Library System	119,815	6,446
Friends of the Mustang Public Library	36,818	1,314
Friends of the Norman Public Library	52,869	2,848
Institute of International Education	210,015	11,336
-Alice Pratt Internship	165,040	8,908
-Colin and Brooke Lee	84,712	4,572
Library Endowment Trust	216,289	11,022
Oklahoma City Literacy Council	27,290	1,362
Oklahoma Humanities Council	155,088	8,372
Oklahomans for Special Library Services	352,153	17,485
Payne Education Center	141,685	7,636

Education: Preschool thru 12th Grade

Calumet School Foundation	20,732	1,120
Casady School	224,213	11,908
-Carolyn Young Hodnett Scholarship	200,700	10,802
-Eleanor Kirkpatrick Fine Arts Chair	1,112,461	59,800
-John E. Kirkpatrick Fund	957,139	35,265
-Jane B. McMillin Memorial	55,849	2,883
-Records Family Scholarship	516,407	27,795
-Scholarships	184,609	9,833
Celebrations Preschool	130,366	6,984
Christ the King Catholic School	53,071	2,728
-James C. & Virginia W. Meade Fund	62,162	3,035
Deer Creek Schools Foundation	1,541,987	70,687
Edmond Public Schools Foundation	253,005	12,366
-Rees Fund	25,295	1,236
El Reno Public School Foundation	68,855	1,950
-Wilbur and Jean Gardner Scholarship	27,035	869
Heritage Hall School	1,673,494	139,242
Erna Krouch Preschool	62,885	3,367
Markoma Christian Ministries	943,932	37,188
Bishop McGuinness Catholic High School	174,084	9,397
Midwest City-Del City Public Schools Foundation	333,541	14,739
Moore Public Schools Foundation for Academic Excellence	134,836	7,278

Name	Market Value 6.30.08	FY2008 Distribution
Mt. Saint Mary High School	364,199	15,260
-Tom Swyden Fund	15,731	849
Oklahoma City Public Schools Foundation	209,989	11,301
Oklahoma FFA Foundation	963,156	33,941
Oklahoma Foundation for Excellence	155,915	8,390
Oklahoma School of Science and Mathematics	283,438	15,054
Positive Tomorrows	389,226	20,961
Putnam City Public Schools Foundation	454,657	24,539
Rosary Catholic School	102,142	5,465
Sacred Heart Catholic School	270,722	12,409
St. Charles Borromeo Catholic School	59,819	3,204
St. Elizabeth Ann Seton Catholic School	59,443	3,208
St. James Catholic School	224,576	12,122
St. John Christian Heritage Academy/ Waltine Lynette Jackson Endowment	137,412	7,417
St. John's Episcopal School	160,145	8,645
-Calvin and Peola Battle Scholarship	9,387	507
-Edward Wade Dalton Memorial	13,923	751
-Sherry Rowan Scholarship	5,967	322
St. Mary's Episcopal School of Edmond	61,644	3,279
Special Care	288,450	7,812
Trinity School	97,944	5,272
Villa Teresa School	102,936	5,556
Westminster School	418,531	22,427
-Gregory L. Shadid Memorial	123,848	5,958

Education: College, Universities & Vocational Schools

Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha	17,813	650
Hillel Foundation/University of Oklahoma	419,403	22,423
-Louis Berlowitz Lodge	10,933	590
-B'nai B'rith Milton J. Gordon Memorial	213,609	*
-John Horwitz Memorial Library	19,620	1,044
Langston University	601,605	15,451
-Kirkpatrick Scholarship	60,723	2,397
Oklahoma Baptist University	152,719	8,238
-Business Program	128,798	6,947
-Hobbs Lectureship	213,875	11,537
-James Hurley Professorship	65,738	3,546
-Scholarships	86,200	4,639
Oklahoma Christian University	1,168,477	55,346
Oklahoma City Community College	192,320	10,381
Oklahoma City University	2,254,659	121,244
-Benham Professorship	163,336	8,792
-Film Institute	24,471	1,308
-Fine Arts Department	98,797	5,318
-Law School Dean's Fund	204,508	10,989
-Law School Seminar Fund	237,755	11,198
-Petree School of Music Fund	115,345	6,209
-Societies Fund	85,289	4,589
Oklahoma State University/School of Civil & Environmental Engineering	127,093	5,644
Oklahoma State University - Oklahoma City	122,955	6,306
-Horticulture Center	235,315	12,456
-Rumsey Garden Fund	107,835	5,530
Opportunities Industrialization Center	253,839	13,702
Redlands Community College	49,612	1,042
Southern Nazarene University Scholarship Fund	22,419	1,142
St. Gregory's University		
-Scholarships for Women Fund	121,931	6,556
-Vogt Fund	28,495	1,538
Francis Tuttle Foundation	183,079	9,836
United States Air Force Academy/John E. Kirkpatrick	356,461	19,242
United States Military Academy/John E. Kirkpatrick	356,711	19,254
United States Naval Academy/John E. Kirkpatrick	356,469	19,242

Donor Report 2008

Name	Market Value 6.30.08	FY2008 Distribution
University of Central Oklahoma		
-Department of History & Geography/ Diane Neal Kremm Fund	29,103	1,571
-Fine Arts	90,169	4,866
-Kirkpatrick Service Awards	372,346	20,094
-Nursing Scholarship	26,829	1,448
University of Oklahoma Health Sciences Center		
-Medical College Alumni Association Research	28,058	1,429
-Watson Scholarship	24,764	1,261
-Robert M. Bird Society	133,646	6,804
University of Oklahoma Norman Campus		
-Bizzell Memorial Library	158,970	8,581
-Jerry Cooper Marching Band Scholarship	49,438	2,669
-Bizzell Memorial Library	25,536	1,378
-Fred Jones Jr. Museum of Art	198,990	10,490
-Naval ROTC	108,532	5,856
A. Kurt Weiss Lectureship	31,075	

Environment & Animals Organizations

Best Friends of Pets	26,470	1,300
Choctaw Parks Foundation/Historical Sculpture		
Gardens Perpetual Care	42,518	1,171
Free to Live	253,770	13,628
Friends of Martin Park Nature Center	48,156	2,585
Morris Animal Foundation	151,609	3,002
Myriad Gardens Foundation	122,152	6,560
The Nature Conservancy/Oklahoma Chapter	241,114	13,015
Oklahoma City Beautiful	228,409	9,751
-Morrison Tucker Award	42,892	2,315
-Wildflowers Fund	43,023	2,322
Oklahoma City Geological Foundation	21,885	1,153
Oklahoma Horticultural Society	81,091	4,318
Oklahoma River Foundation	412,177	13,894
Oklahoma Zoological Society	591,371	31,794
The Tree Bank	121,232	6,252

Health-Related Organizations

Alzheimer's Association/Oklahoma & Arkansas Chapter	25,136	1,219
American Cancer Society	175,198	9,443
American Diabetes Association	50,790	2,740
American Lung Association of Oklahoma	8,446	460
Arthritis Foundation/Oklahoma Chapter	101,909	5,449
Camp Cavett	95,287	3,963
The Children's Center	202,418	10,925
The Children's Center Foundation	68,453	483
Children's Medical Research Institute	190,979	10,276
Community Health Center/Mary Mahoney Memorial Health Center	96,380	4,909
Deaconess Home/Pregnancy and Adoption Services	160,744	8,732
Epilepsy Association of Oklahoma	123,827	6,528
Integrus Baptist Medical Center	702,410	37,852
-Baptist Burn Center	436,119	23,501
-James L. Hall Jr. Center for Mind, Body & Spirit	147,230	6,692
Integrus Southwest Medical Center	47,790	2,580
The Leukemia & Lymphoma Society	22,485	1,214
Lupus Foundation of America/Oklahoma Chapter	29,126	1,571
Dean A. McGee Eye Institute	257,862	13,906
Mercy Health Center	227,225	12,249
National Multiple Sclerosis/Oklahoma Chapter	17,784	961
Oklahaven Children's Chiropractic Center	27,103	1,463
Oklahoma Blood Institute	20,000	*
Oklahoma Brain Tumor Foundation	19,673	1,065
Oklahoma Community Health Services	92,004	4,448

Name	Market Value 6.30.08	FY2008 Distribution
Oklahoma Medical Research Foundation	317,233	17,095
-Fleming Scholarship	494,493	26,659
-D. Allan & Dorothy B. Harmon Memorial Fund	92,230	4,838
-Research Fund	20,388	1,099
Oklahoma Physical Therapy Foundation	70,612	2,849
Oklahoma Safe Kids Coalition	19,572	1,056
Planned Parenthood of Central Oklahoma	216,965	11,695
-Cleo Cross Fund	9,094	491
Prevent Blindness Oklahoma	20,862	1,127
Referral Center for Alcohol and Drug Services	88,558	4,780
Russell-Murray Hospice	20,660	1,078
St. Anthony Hospital Foundation	333,621	17,963
United Cerebral Palsy	64,113	3,461
Variety Health Center	219,921	11,664

History & Preservation Organizations

45th Infantry Division Museum	276,507	13,087
95th Division Foundation	39,806	1,738
Arcadia Historical & Preservation Society	22,032	1,170
Break O'Day Farm and Metcalfe Museum	18,252	542
Cleveland County Historical Society	20,384	1,101
Edmond Historical Society	43,306	2,185
Friends of Oklahoma Historical Society Archives	54,513	2,611
William Fremont Harn Gardens and Homestead	900,636	48,422
-1889er's Fund	10,591	571
Oklahoma Archaeological Survey	21,926	1,137
Oklahoma City-County Historical Society	178,595	8,407
Oklahoma Heritage Association	168,807	9,026
-Gary & Elizabeth Huckabay Scholarship	17,457	942
-Scholarship Fund	164,402	8,874
Oklahoma Historical Society	489,417	18,595
Oklahoma Historical Society - Guthrie Carnegie Library	19,676	250
Oklahoma History Center	921,979	50,591
Oklahoma Railway Museum	24,010	1,228
Oklahoma State Firefighter's Museum	51,199	2,764
Oklahoma Westerners Indian Territory Posse	60,796	12,000
Overholser Mansion	125,079	6,715
-Dianne Gumerson Memorial	8,194	346
Preservation Oklahoma	30,159	1,621
Science Museum Oklahoma	55,668,092	1,673,366
Stillwater Museum Association/Sheerar Museum	19,464	1,038
Westerners International	143,264	7,726

Neighborhood Associations

Capitol View Neighborhood Association	35,079	1,894
Crown Heights-Edgemere Heights Neighborhood Association	154,257	8,052
Edgemere Park Preservation Area	38,032	2,028
Historic Brookhaven Neighborhood Association	94,229	4,990
Mesta Park Neighborhood Association	53,857	2,870
Neighborhood Alliance of Oklahoma City	97,564	5,261
Oklahoma City Housing Services Redevelopment Corp. Positively Paseo	172,964	9,336
Putnam Heights Preservation Area/Anderson Family Endowment Fund	64,286	3,398
Shartel Boulevard Development Authority	103,548	5,427

Religious Organizations

All Souls' Episcopal Church	803,054	40,532
-Music Fund	17,218	843
4HIM - His Healing Helping Hands		
International Ministries	27,995	1,232
LifeChurch.tv	22,540	

Name	Market Value 6.30.08	FY2008 Distribution
Sisterhood of Temple B'nai Israel	46,795	2,502
-Seligson Flower Fund	6,000	*
Sisters of Benedict	19,999	1,080
Temple B'nai Israel Centennial Fund	27,466	

Senior Adult Service Organizations

Areawide Aging Agency	97,758	5,272
Baptist Retirement Center	154,743	8,353
Daily Living Centers	296,263	15,992
Edmond Senior Community Foundation	51,929	2,709
Foundation for Senior Citizens	60,681	3,276
Oklahoma Alliance on Aging	18,857	465
Oklahoma County Senior Nutrition Program	46,597	2,422
RSVP - Retired & Senior Volunteer Program of Central Oklahoma	86,585	4,635

Social Services Organizations

Aid for Individual Development	171,469	9,256
American Red Cross of Central Oklahoma	198,186	10,657
CARE - Child Abuse Response and Evaluation Center	73,836	3,977
CASA of Oklahoma County	20,000	*
Catalyst Behavioral Services	28,335	1,421
Catholic Charities of the Archdiocese of Oklahoma City	130,859	7,050
Central Oklahoma Association for the Deaf & Hard of Hearing	48,792	2,631
A Chance to Change	148,106	7,940
Citizens Caring for Children	74,375	4,012
City Rescue Mission	70,053	3,496
Coffee Creek Riding Center	28,258	1,503
Consumer Credit Counseling Services of Central Oklahoma	22,558	1,218
Easter Seals of Oklahoma	124,533	6,722
EARC - Employment & Residential Centers	24,334	1,310
Exchange Club Center for the Prevention of Child Abuse	118,127	6,372
FIRSTSTEP	399,537	21,511
Genesis Project	91,236	4,910
Heartline	188,708	10,186
Hope Center of Edmond	21,563	1,134
Infant Crisis Services	224,019	10,449
Jesus House	154,446	8,084
Make-A-Wish Foundation of Oklahoma	86,619	4,618
Make Promises Happen/Central Oklahoma Christian Camp	91,447	4,870
McCall's Communities for Life Enrichment	476,914	22,475
Meadows Center for Opportunity	200,053	10,424
Mental Health Association of Central Oklahoma	98,701	5,275
NAIC - Norman Addition Information & Counseling	18,876	1,031
Neighbor for Neighbor of Oklahoma City	345,499	18,641
Neighborhood Services Organization	197,806	10,677
Oklahoma Foundation for the Disabled	93,485	5,046
Oklahoma Foundation for the Education of Blind Children & Youth	42,775	2,309
Oklahoma Goodwill Industries	667,641	29,248
Oklahoma Halfway House	145,175	7,836
Oklahoma Lawyers for Children	30,607	1,411
Oklahoma League for the Blind	129,407	6,371
Peppers Ranch	19,073	1,039
Presbyterian Urban Mission	210,979	10,897
Rainbow Fleet	123,334	6,657
Rebuilding Together	45,827	2,306
Regional Food Bank of Oklahoma	183,037	9,749
Reliant Living Centers of Oklahoma	43,789	2,364
Dale Rogers Training Center	292,167	15,768

Name	Market Value 6.30.08	FY2008 Distribution
SAFY - Specialized Alternatives for Families & Youth	18,944	1,031
The Salvation Army	314,095	16,752
-Ed Leslie Fund	501,960	27,067
Scope Ministries International	113,209	6,111
Skyline Urban Ministry	260,884	13,825
Special Olympics Oklahoma	24,635	1,330
Speck Homes	673,188	36,106
Sunbeam Family Services	237,398	12,810
TEEM - The Educational and Employment Ministry	202,884	10,404
Traveler's Aid Society	88,409	4,755
United Methodist Boys Ranch	57,122	2,522
United Way of Central Oklahoma	207,191	11,184
Urban League of Greater Oklahoma City	54,836	2,960
Willow Springs Boys Ranch	32,735	1,728
Work Activity Center	500,578	27,001
World Neighbors	854,084	45,914
Youth Services for Oklahoma County	171,716	9,182
YWCA of Oklahoma City	119,607	6,451

Youth-Serving Organizations

Big Brothers Big Sisters of Greater Oklahoma City	160,852	8,683
Boy Scouts of America - Last Frontier Council	503,719	26,740
Boys & Girls Club of Oklahoma County	187,043	7,641
Camp Fire USA - Heart of Oklahoma Council	258,505	13,949
Chesapeake Swim Club	148,585	7,626
Denny Price Family YMCA of Enid	19,963	1,041
Fellowship of Christian Athletes	199,191	10,675
-Stephen B. Payne FCA Scholarship	125,025	6,749
Girl Scouts - Western Oklahoma	152,008	8,164
Junior Achievement of Greater Oklahoma City	139,738	7,494
Oklahoma City Police Athletic League	48,144	2,599
Salvation Army Boys and Girls Club of Oklahoma City	129,948	6,989
Whiz Kids/City Care	19,413	1,029
YMCA of Greater Oklahoma City	409,517	22,042
-Camp Classen	462,103	24,645
-Camp Classen Eberly Scholarship Endowment	222,801	11,950
-Downtown	97,453	5,250
-Eastside	85,428	4,603
-Northside	9,735	524
Youth Leadership Exchange	44,648	2,398

**new fund established after 6/30/2008*

Scholarship & Award Funds

The Scholarship & Award Funds listed below are those with multiple donors. Donors who are the lone source of support for a particular fund receive a report about that separate fund. The distribution refers to the amount awarded in the current year. Some awards may not be paid until a later date. In most cases, the distribution amount is based on 5 percent of the average market value of the fund over the previous 8 quarters.

Name	Fund Value 6.30.08	Distribution
Mike Allen Memorial Education	40,057	1,000
Aaron Alley Memorial Scholarship	29,593	1,000
Hal Almen West OKC Rotary Scholarship	1,714,685	78,000
American Society of Civil Engineers Scholarship	16,509	
American Society of Landscape Architects Scholarship	21,784	1,000
Andersen Spraberry - Perry High School Endowment	110,908	
Andersen Spraberry - Prague High School Endowment	109,139	1,800
Patrick S. Bonds Memorial Scholarship	30,451	1,500
Vinita F. Boyer Scholarship	93,409	2,550
Dr. Eugene S. Briggs Memorial Scholarship	121,926	6,584
BSO Ivy Foundation	26,606	500
Capitol Hill High School Scholarship	53,419	500
Elizabeth E. Carlson Scholarship	393,846	3,000
Casady Class of 1996 Scholarship	36,298	3,955
Casady School - Geneva Hood Award	62,559	3,000
Central High School Alumni Association	210,528	8,400
Christmas Connection - Barbara Fagin Fund	34,234	1,000
Classes 55 Scholars	92,834	2,500
Classen Awards Foundation	109,662	
Classen Class of 1945 Scholarship	36,011	1,000
Ralph Clinton Memorial	50,897	600
Harley Custer Memorial Scholarship	46,228	1,000
Dana Corporation Scholarship	115,755	4,200
Dortha Dever Business Scholarship	39,787	
Durant Community Scholarship	79,755	1,000
Early Childhood Association of Oklahoma	30,004	3,700
Everett Foundation Scholarships	95,807	4,000
Wauhillau Austin Gale Memorial Scholarship	19,068	1,000
Ema Garcia Memorial Scholarship	23,153	2,249
Elsie Mae (Nat) Glosemeyer Memorial Scholarship	30,609	500
Freda Poole Grayson Scholarship	19,799	800
Holistic Health Care Scholarship	21,889	225
Hudiburg Family Scholarship	64,057	9,000
Iron Workers Local 584 & Signatory Contractors Scholarship	44,976	2,000
Dennis James Scholarship - Deer Creek Baseball	18,849	1,000
Jones High School Scholarship	39,679	2,000
Friends of Kim Jones-Shelton Scholarship	17,174	500
Junior League - Rumsey Award	55,197	3,000
Rev. Kenneth King Memorial Scholarship	42,924	*
Valerie Koelsch Memorial Scholarship	45,856	7,500
Kirshner Trust Scholarship	193,879	9,683
Wann and Clara Langston Scholarship	109,249	5,930
Lawton Noon Lions Club Scholarship	90,060	1,000
Oklahoma Arts Institute Scholarship	26,052	1,300
Charles Thomas 'Tommy' Lewis Memorial	33,437	399
McGee Foundation Scholarship	492,616	26,891
Moore High School Alumni Association Scholarship	33,157	1,197
Moore High School Alumni Association -George and Doral Hopper Scholarship	20,507	
Moore High School Alumni Association - Bennie Raine Scholarship	20,683	1,130
Gary M. Moore M.D. Dance & Arts Management Scholarship	137,432	7,000
Gary M. Moore M.D. Great Plan Scholarship	2,994,027	1,000
Kimberly Kay Clark Naval Reserve Association Scholarship	19,866	1,074
Northwest Classen High School Class of 1956	43,961	1,200
Oklahoma Engineering Foundation Scholarship	147,992	7,010
Oklahoma Pilots Association Vic Jackson Scholarship	29,293	1,551
OKC Northwest Lions Club Scholarship	22,908	1,000

■ New Funds, no distribution in FY 2008

Orner-Cook Scholarship	19,663	1,000
OSU Agricultural Education Scholarship, Inc.	421,233	19,303
Deborah R. Parker Scholarship	132,978	7,218
Senator Homer Paul Memorial Scholarship	39,341	1,500
Pi Beta Phi Alumnae Club Scholarship	98,645	5,000
Pilot Club Scholarship	9,812	533
Floy I. Pinkerton Vocal Music Scholarship	11,460	500
Larry W. Roach Leadership Award	22,376	1,000
Jeffry Rogers Education Memorial	55,857	2,000
Will Rogers Air National Guard Scholarship	44,803	2,347
Seay A. Sanders Jr. Scholarship	17,470	500
Guthrie Public Schools Sessions Teaching Award	29,745	2,000
St. James School Lorene Sherman Memorial Scholarship	26,083	3,000
Tracy Wilson Memorial Scholarship	27,290	2,400
Willie Elizabeth Shipley Scholarship	438,444	23,800
Robert V. Smith Memorial Scholarship	26,259	1,500
Pete & Lela Stavros Scholarship	39,846	2,500
Wendell Steward Scholarship	19,264	1,000
Troop 193 Leadership Scholarship	83,214	1,000
University of Oklahoma School of Music -Alice Everett Cello Scholarship	70,296	1,000
-Dorothy Detrick Kendall Piano Scholarship	33,823	1,000
Marie Welch IIAO Scholarship	73,743	3,977
Western Oklahoma Building Trades Scholarship	21,823	1,000
Westside Lions Club Scholarship	11,281	625
Dean Wild Memorial Scholarship	18,653	1,000
Deral E. Willis Scholarship	19,000	1,000
James M. Wilson Scholarship	22,137	500
Mildred and William Young Scholarship	29,053	*
Dan Zanowiak Memorial Scholarship	21,050	1,000

Lawton Community Foundation Charitable Organization Endowments

The Lawton Community Foundation is an affiliated organization of the Oklahoma City Community Foundation. The Lawton Community Foundation provides match opportunities to local charitable organizations to create endowment funds. Following are the charitable organization endowments established through the Lawton Community Foundation. The distribution amount is based on 5 percent of the average market value of the fund over the past 8 quarters.

Name	Fund Value 6.30.08	Distribution
Arts for All	24,201	1,305
Cache School Scholarship	78,974	3,402
Comanche County Memorial Hospital Foundation	19,790	1,076
Field Artillery OCS Alumni Chapter	23,401	1,217
First United Methodist Church Foundation of Lawton	99,454	4,923
Giddy Up 'N Go	47,197	2,432
Great Plains AMBUCS-Kid's Zone	20,518	1,107
Robert E. Greiner School for the Handicapped of Comanche County	32,150	1,734
Hackberry Flat Foundation	37,058	1,974
Holiday in the Park	21,168	1,146
Lawton Community Theatre	18,173	981
Lawton - Family YMCA	18,341	990
Lawton-Fort Sill Armed Services YMCA Gene Love Endowment	176,202	8,117
Lawton Noon Lions Club Scholarship	90,060	1,000
Lawton Philharmonic Orchestra	18,123	992
Lawton Public School Foundation	306,404	15,945
Museum of the Great Plains	27,176	1,428
Oklahoma Arts Institute Scholarship	26,052	1,300
On the Chisholm Trail Association Heritage Center	23,154	1,192
Southwest Oklahoma Genealogical Society	20,014	1,080
United States Field Artillery Association Foundation	43,956	1,650
United Way of Lawton/Ft. Sill	29,867	1,511

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For a complete staff directory, please visit www.occf.org/staff.

Giving Later: Deferred

Providing simple and flexible giving options for donors is an important service we offer for individuals and families. Our staff has the expertise and knowledge to assist donors and their professional advisors with developing a gift planning process that both meets donors financial and charitable needs whether they are making a gift now or considering a “deferred gift” that is part of an overall estate plan.

Deferred gifts, which are often referred to as planned gifts or estate gifts, are attractive to those donors who want to relieve the tax burden on heirs and make a charitable gift at a later time. Below are examples of deferred gifts that we can facilitate.

Charitable Gift Annuities

A charitable gift annuity (CGA) provides the donor not only with income for life but also creates a lasting gift to the community. Through a CGA, a donor makes a gift with cash or other assets, receives income for life, a charitable deduction and, at the end of the annuity, the remaining assets will go to the charitable funds of the donor’s choosing. We offer six CGA options to consider.

Bequests

With a bequest, a donor can designate a sum of money, a percentage, the residual or their entire estate to benefit an existing fund or to establish a new fund. This option may provide a donor’s family with substantial reductions in federal estate taxes. We offer sample bequest language at www.occf.org.

Retirement Plan Assets

Retirement plan assets are subject not only to estate taxes, but also federal and state income taxes. To reduce this burden on heirs and to create a charitable legacy, donors can use their retirement plan assets or a portion of the assets to establish an advised fund at the Oklahoma City Community Foundation. The donor’s heirs can make suggestions as to which charitable organizations or causes to support with the earnings from the fund.

Charitable Remainder Trusts

A charitable remainder trust allows a donor to place assets such as appreciated property in a trust that pays annual income to the donor or a beneficiary for life or a term of years. Upon the trust’s termination, the remaining assets will benefit an endowment designated by the donor. This type of gift allows a donor to avoid capital gains tax on the donated assets and also receive an income tax deduction for the fair market value of the remainder interest of the trust. In addition, the trust is removed from the donor’s estate, reducing subsequent estate taxes. We provide two types of charitable remainder trusts: annuity (fixed income) and unitrust (variable income).

Gifts As An Option

Charitable Gift Annuity: Example of a \$20,000 cash gift

Your age	Annuity Rate*	Annual Income/Tax-Free Portion	Income Tax Deduction**
60	5.5%	\$1,100/\$595	\$5,654
65	5.7%	\$1,140/\$658	\$6,909
70	6.1%	\$1,220/\$756	\$7,976
75	6.7%	\$1,340/\$890	\$8,968
80	7.6%	\$1,520/\$1,072	\$9,922
85	8.9%	\$1,780/\$1,350	\$10,817
90	10.5%	\$2,100/\$1,663	\$11,851

*Annuity rates per the American Council on Gift Annuities as of October 1, 2008. Annuity rates are subject to change. Once an annuity is established, the rates remain fixed.

**A portion of income is considered return of principal calculated on mortality tables, therefore resulting in a tax-free distribution for a limited time.

Charitable Lead Trusts

A charitable lead trust allows a donor to transfer assets to the Oklahoma City Community Foundation that then pays a percentage of the assets' value to an endowment designated by the donor. At the end of the trust terms, the remaining assets are passed back to the donor or on to designated heirs. Benefits to the donor may include greatly discounted gift or estate taxes and any growth in the assets will be free of these taxes for the heirs. In certain cases, a charitable lead trust may also provide an income tax deduction at the time the trust is created.

Life Insurance

Life insurance can be an effective means for a donor to fund a charitable giving plan without significant outlays of cash. If the policy is gifted, the donor receives a tax donation.

For additional information please call Joe Carter, Director of Planned Giving, at 405/606-2914 or e-mail to j.carter@occf.org.

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www.OCCF.org: New and Improved

We've updated our Web site! Don't worry, all of the same great resources and information are all still available. But occf.org does have a new look plus we've also added several new tools that we believe make the site even more useful.

To help familiarize you with the revised site, below is a quick guide.

Navigating the Site

We've reorganized the Web site into eight sections. You will find the navigation for these sections at the top of each Web page. As you place your cursor over each section name, a menu will drop down and list the pages included within that section. As you go to a section page, you will notice that that section's navigation now appears on the right hand side with easy links to additional section pages.

A snapshot of each section:

Donors – includes information and resources for anyone who has made a gift or is considering a gift to the Oklahoma City Community Foundation. This is where you'll find DonorCentral, fund policies and agreements, Central Oklahoma Charities and a link to the Online Giving page where we accept gifts to endowments from donors using major credit cards.

Professional Advisors – we've created a section that addresses the specific needs of professional and financial advisors as they work with their clients on charitable giving. Visitors will find information about our services, fund policies and agreements, the Planned Giving Design Center and information on our investment management.

Nonprofit Services – we offer a variety of resources for charitable organizations in the community. This section includes Community Programs, the Kirkpatrick Family Fund, the Planned Giving Design Center, Central Oklahoma Charities and additional resources.

Community Resources – we've compiled several resources that benefit all residents interested in charitable giving and our community as a whole. Visitors will find Central Oklahoma Charities, Great Places To Walk, Online Giving and a link to ReadOKC.org, a Web site directory of literacy resources available in our community.

Scholarship Center – in addition to our Trustee Scholarship Initiative, we also administer the state's largest independent scholarship program. All scholarships are listed in a directory that includes application forms as appropriate. For students and parents, we also offer guidelines on financial aid and college admissions.

Documents – formerly known as the Forms Library, visitors can now easily find fund policy statements and agreements and grant and scholarship applications either in an alphabetical or categorical listing.

About Us – We've added our history, how we're governed, our most recent audited financial statements and answered frequently asked questions. Many of our publications are also available online.

Home – takes you back to the opening page.

Additions

To ease your efforts to locate information, we've added a search component to the site. Located in the top left corner, you can search the entire Web site by typing in key words or phrases.

You may notice that several sections share common information such as Online Giving, Central Oklahoma Charities, Investment Management and Fund Policy Statements and Agreement Forms. We did this to ensure the resources we offer are easily accessible. When you are viewing a shared page, the right navigation will revert to the main sections. Use your back key to return to prior page.

Visitors now have the ability to increase and decrease the size of the type on each page. Click on Smaller Type/Larger Type to adjust the size of the type.

We now have the ability to add color images and photographs, making the site more inviting and interesting. We look forward to featuring donors and organizations in a more colorful way.

