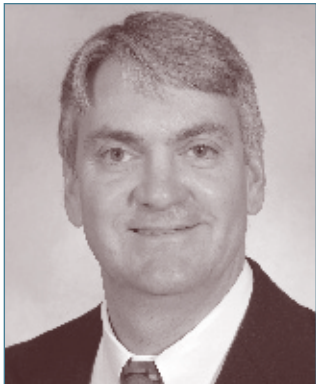


# Donor Report

 OKLAHOMA CITY COMMUNITY FOUNDATION

*Helping you help the community*

2009



Kirkland Hall  
*President, Board of Trustees*



Nancy B. Anthony  
*Executive Director*

## Dear Donors:

We are pleased to provide you with the 2009 Donor Report. At the Oklahoma City Community Foundation we are very fortunate to have donors who are thoughtful and generous in their support of charitable organizations and projects. In times of economic turmoil, you continued to make gifts, recommend grants and create endowment funds. During fiscal year 2009, donors made gifts in excess of \$19 million and 44 new funds were started.

While our investment return for fiscal year 2009 was -14.61 percent for the general pool, we strongly believe that combined with your support, our commitment to a long-term investment strategy helped to buffer the most severe effects suffered by other foundations. In this publication we've included information about our fiscal year investment performance and a summary of our investment and distribution policies for your reference. In addition, the Donor Report includes the fiscal year 2009 fund value and distribution amounts for the charitable organization endowments and scholarship funds we administer.

Many of you made gifts within the last year to benefit one or more of the 280 endowments participating in the John Kirkpatrick Centennial Endowment Challenge. Thanks to your support, nearly \$4 million was added to these endowment funds. For a recap of the challenge, please see page 11.

We turned 40 years old in 2009. In place of galas and speeches, we opted to celebrate our anniversary by giving back to the community. Please see page 12 for a recap of our 40<sup>th</sup> anniversary activities.

Thank you for your continued support. We look forward to answering any questions you may have.

Kirkland Hall  
President

Nancy B. Anthony  
Executive Director

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\* Retired June 30, 2009

\*\* Effective July 1, 2009

## Commitment to quality, diversified investments helps buffer impact of volatile markets

For the fiscal year ending June 30, 2009, the Oklahoma City Community Foundation's general investment pool had a total return of -14.61 percent. This annual return included one of the worst quarters in our 40-year history, -11.78 percent in the December 31 quarter, and one of the best quarters, 9.01 percent in the June 30 quarter. The volatility of the financial markets throughout the entire year has been well-noted in the press and felt in every sector of the world economy. While negative results are clearly not our investment goal, we were pleased to finish the year on a very positive note. As endowment fund investors, we have a long-term horizon. FY2009 was quite an investment storm, but we think that we have weathered through the worst and have opportunities for good investment returns in the coming quarters.

The investment performance awards for FY2009 will go to the "best of the worst." The average return for the 290 foundation endowments reporting to the Commonfund Benchmark Survey was -26.0 percent. Our return was in the top 20 percent for this group of foundations and our average investment cost of 37 basis points (0.37 percent) was approximately half of the median cost of 69 basis points reported by the Commonfund survey.

Our better-than-average return resulted from a number of both long-term and timely investment strategies. First and most

importantly, we have maintained a long-term diversification strategy with an allocation to high quality fixed-income assets, even in times of booming equity investments. That allocation and an investment commitment to high quality government bonds by fixed income managers produced a significant positive return of 5.38 percent for fixed-income investments for FY2009. Second, the Investment Committee had a very disciplined approach to rebalancing which it followed throughout the year. It did not sell out of equity positions and achieved a significant rebound in the fourth quarter as equities came back. Third, we did not have any illiquid investments, and in fact, maintained a larger-than-normal cash position, which provided plenty of liquidity to meet the cash requirements for grants and distributions.

The time horizon for our endowment assets is perpetual. We have and will continue to maintain the discipline required for a long-term investment strategy while utilizing short-term tactical allocations to add value when there is opportunity. The Investment Committee and our investment counsel, Hotchkiss Associates LLC, are all very committed to the long-term. And while FY2009 was certainly a test of the commitment to this discipline, we survived the test and are looking forward to the positive rewards that will come from continuing commitment to both diversification and quality investments.

## Investment Performance Highlights

	Year Ended June 30, 2009	Three Years Ended June 30, 2009	Five Years Ended June 30, 2009	Ten Years Ended June 30, 2009
<b>TOTAL RETURN</b>				
Oklahoma City Community Foundation	-14.61%	-2.06%	1.53%	2.53%
S&P 500/Barclays G/C Int *	-15.20%	-2.72%	0.55%	0.91%

\* 65% S&P 500/35% Barclays G/C Int

## Fiscal Year 2009 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, 2009	June 30, 2009	June 30, 2009			
<b>EQUITY</b>						
<b>LARGE CAP VALUE</b>						
Wedge Capital Management	6.71%	11.38%	-26.53%	June 30, 2007	13.68%	15.40%
Barclays Russell 1000 Value Index Fund	4.86%	8.23%	-29.04%	June 30, 2006	6.82%	5.54%
Russell 1000 Value			-29.03%	June 30, 2005	7.52%	5.76%
<b>LARGE CAP GROWTH</b>						
Barclays Russell 1000 Growth Index Fund	15.36%	26.02%	-24.20%	June 30, 2004	15.03%	12.39%
Russell 1000 Growth			-24.49%	June 30, 2003	5.28%	3.96%
<b>SMALL/MID CAP VALUE</b>						
Earnest Partners	4.40%	7.46%	-27.51%	June 30, 2002	-5.58%	-8.83%
Russell 2000 Value			-25.25%	June 30, 2001	-5.65%	-5.78%
<b>SMALL/MID CAP GROWTH</b>						
Columbus Circle Investors	5.03%	8.52%	-35.96%	June 30, 2000	10.30%	6.19%
Russell 2500 Growth			-27.30%			
<b>INTERNATIONAL</b>						
Barclays EAFE Index Fund	4.03%	6.83%	-31.17%			
MSCI EAFE (US\$) Net			-31.36%			
Barclays Emerging Markets Index Fund	0.94%	1.59%	-26.31%			
Aberdeen Emerging Markets Fund	1.41%	2.39%	52.24%*			
MSCI EMF (Gross) Index			-27.82%			
<b>CORE</b>						
Barclays Russell 1000 Index Fund	10.41%	17.63%	-25.89%			
Russell 1000			-26.69%			
Kalmar Investments	3.69%	6.26%	-27.68%			
Barclays Russell 2000 Index Fund	0.01%	0.02%	-24.24%			
Russell 2000			-25.01%			
<b>HIGH YIELD BONDS</b>						
Wells Capital Management Sutter Fund	2.16%	3.67%	2.92%*			
<b>TOTAL EQUITIES</b>	<b>59.01%</b>	<b>100.00%</b>	<b>-27.34%</b>			
S&P500 Stock Index			-26.22%			
<b>FIXED INCOME</b>						
JPMorgan	22.15%	60.91%	7.59%			
Bank of Oklahoma	14.16%	38.95%	2.13%			
Barclays 1-3yr. Treasury Bond Index Fund	0.05%	0.14%	3.78%			
<b>TOTAL FIXED INCOME</b>	<b>36.36%</b>	<b>100.00%</b>	<b>5.38%</b>			
Barclays G/C Int. Index			5.27%			
Barclays 1-3 Govt			4.94%			
<b>CASH</b>						
JPMorgan Money Market Fund	4.63%		1.21%			
<b>TOTAL POOLED INVESTMENTS</b>	<b>100.00%</b>		<b>-14.61%</b>			
<b>Composite Indices</b>						
65% S&P500 / 35% Barclays G/C Int.			-15.20%			

\* Partial Period

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.

Year Ended	General Pool Rate of Return	Composite Indices (Note A)
June 30, 2009	-14.61%	-15.20%
June 30, 2008	-3.23%	-5.94%
June 30, 2007	13.68%	15.40%
June 30, 2006	6.82%	5.54%
June 30, 2005	7.52%	5.76%
June 30, 2004	15.03%	12.39%
June 30, 2003	5.28%	3.96%
June 30, 2002	-5.58%	-8.83%
June 30, 2001	-5.65%	-5.78%
June 30, 2000	10.30%	6.19%
<b>Ten Years Compounded (Note A)</b>	<b>2.53%</b>	<b>0.91%</b>

Note A: Equity performance is compared to the Standard and Poor's 500 stock index (S&P500); fixed income performance is compared to the Barclays Government/Credit Intermediate bond index (Barclays 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.

## General Pool Investment Managers

Effective 6/30/09

### EQUITY

**LARGE CAP VALUE**  
Wedge Capital Management,  
Charlotte, NC  
Barclays Global Investors,  
San Francisco, CA

**LARGE CAP GROWTH**  
Barclays Global Investors,  
San Francisco, CA

**SMALL/MID CAP VALUE**  
Earnest Partners, Atlanta, GA

**SMALL/MID CAP GROWTH**  
Columbus Circle, Stamford, CT

**INTERNATIONAL**  
Barclays Global Investors, San  
Francisco, CA  
Aberdeen Asset Management,  
Philadelphia, PA

### LARGE CAP CORE

Barclays Global Investors,  
San Francisco, CA

### SMALL CAP CORE

Kalmar Investors, Wilmington, DE  
Barclays Global Investors,  
San Francisco, CA

### HIGH YIELD BONDS

Wells Capital Management,  
San Francisco, CA

### FIXED INCOME

JP Morgan Asset Management,  
Columbus, OH  
& Oklahoma City, OK  
Bank of Oklahoma,  
Oklahoma City, OK  
Barclays Global Investors,  
San Francisco, CA

## Endowments benefit from low-cost, efficient investment program

The low cost and efficient operation of our investment program benefits all endowments, large and small. We accomplish this 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. As a result, 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 FY2009, 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 value to that same fund.

Diversification is a hallmark of a solid endowment investment policy and is one of the greatest advantages our investment program offers. 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 that is an affiliate of United Capital Financial Advisers, Inc. (Please see page 3 for a list of investment managers and below for a list of committee members). All funds benefit from the expertise of this committee and their efforts to provide the best investment product at the most efficient price. For 40 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 we provide to the endowments we administer.

## 2008-09 Investment Committee

### Paul W. Dudman, Chairman

Trustee, Oklahoma City Community Foundation  
Attorney, *Fellers Snider Blankenship Baily & Tippens*

### Kirkland Hall

President, Oklahoma City Community Foundation  
*Fred Jones Industries*

### J. Edward Barth

Past President, Oklahoma City Community Foundation  
Ex-officio  
Attorney, *Andrews Davis*

### Steven C. Davis

Trustee, Oklahoma City Community Foundation  
Attorney, *Hartzog Conger Cason & Neville*

### James H. Holloman Jr.

Past President, Oklahoma City Community Foundation  
Attorney, *Crowe & Dunlevy*

### Christian K. Keese

Ex-officio Trustee, Oklahoma City Community Foundation  
Chairman, *Kirkpatrick Bank*

### Jeneé Naifeh Lister

Investment Advisor, *Merrill-Lynch*

### Stephen Mason

Treasurer, Oklahoma City Community Foundation  
Ex-officio  
*Cardinal Engineering*

### Scott Mueller

*Hall Capital Partners*

### Gary Pierson

Chief Operating Officer  
*The Oklahoma Publishing Company*

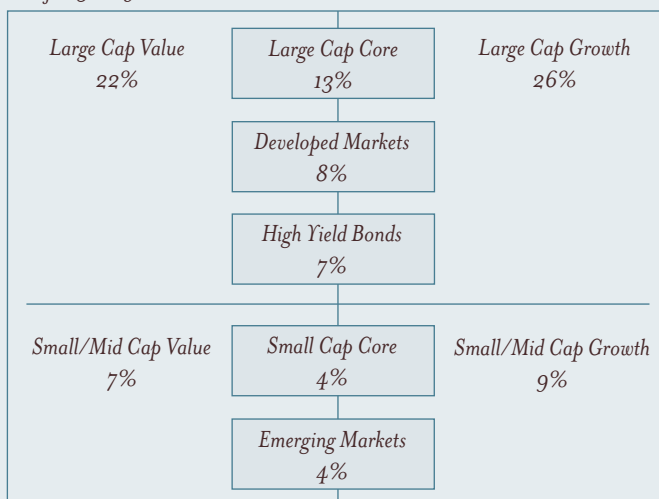
## Investment Counsel

### Hotchkiss Associates, LLC

303 W. Madison, Suite 1050  
Chicago, Ill. 60606

## Asset Class Target Percentage Allocation

As of 6/30/09



## 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%
High Yield Bonds	0-7%		

## 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 \$2 billion; **mid cap** - greater than \$2 billion but less than \$10 billion; **large cap** - greater than \$10 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 stabilizes economic impact on endowments

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 endowments to capitalize on good investment years as well as protect in the event of a low or negative return market. The extreme experience of declining markets in the past months underlines the importance of a policy that smooths the effects of market conditions on annual 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 over time protects future distributions from inflation. Our policy ensures that 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 12, 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.

## 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 listed in the first column. The second column lists the fund value as of June 30, 2009 while the third 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.

Name	Market Value 6.30.09	FY2009 Distribution	Name	Market Value 6.30.09	FY2009 Distribution
<b>Arts &amp; Culture</b>			Oklahoma City Orchestra League	306,988	18,212
Allied Arts Foundation	920,735	52,945	Oklahoma Community Theatre Association	16,254	911
Ambassadors' Concert Choir	106,968	6,438	- Lil Williams Festival Fund	20,406	1,011
American Banjo Museum	4,996,996		Oklahoma Museums Association	72,820	4,071
American Choral Directors Association	20,000	*	Oklahoma Philharmonic	1,343,622	84,146
Arts Council of Oklahoma City	302,234	17,382	- J. Landis Fleming Fund	5,502	354
Ballet Oklahoma	156,122	9,628	- Fund for Collaborative Performances	2,267,470	69,500
Canterbury Choral Society	154,225	9,509	Oklahoma Shakespeare in the Park	57,493	3,270
Chamber Music in Oklahoma	138,092	8,274	Oklahoma Visual Arts Coalition	63,560	2,872
- Berrien Kinnard Upshaw Chamber Music Fund	40,532	2,511	Oklahoma Youth Symphony	21,523	1,334
Cimarron Circuit Opera Company	110,385	6,353	Paseo Artists Association	56,987	3,279
City Arts Center	1,306,402	80,156	Prairie Dance Theatre	84,475	5,114
Civic Music Association	166,981	10,050	Red Earth	145,312	8,996
Fine Arts Institute of Edmond	120,260	5,893	- Kathleen Upshaw Fund	13,458	834
Guy Fraser Harrison Academy for the Performing Arts	60,738	3,098	Science Museum Oklahoma	46,072,334	1,609,600
Individual Artists of Oklahoma/ Linda Jaeger Memorial	37,333	2,230	<b>Community Development Organizations</b>		
International Photography Hall of Fame & Museum	344,396	20,786	Association of Fundraising Professionals	19,177	1,049
Jacobson Foundation	53,571	3,310	Cimarron Alliance Foundation	15,409	956
Jazz in June	23,510	1,161	Crimestoppers of Oklahoma City	68,962	4,126
Ladies Music Club of Oklahoma City	46,487	2,326	Executive Service Corps of Central Oklahoma	27,137	973
Lyric Theatre of Oklahoma	1,085,720	60,080	Executive Women International	110,322	6,791
- Curt Schwartz Scholarship	72,387	4,475	Impact Oklahoma	27,591	1,148
Melton Art Reference Library	42,727	2,647	Jewish Federation of Greater Oklahoma City	208,334	12,317
- Melton Legacy Scholarship Fund	39,248	2,431	- Ralph Dorn Fund	177,736	10,797
Jasmine Moran Children's Museum	85,743	4,844	Junior Hospitality Club	147,681	9,148
National Cowboy & Western Heritage Museum	1,134,648	60,000	Junior League of Oklahoma City	196,719	12,185
National Cowboy & Western Heritage Museum/ Docent Council	23,073	987	Kiwanis Club Special Activities	59,014	3,085
OK Chorale	27,318	1,392	L'Alliance Francaise d'Oklahoma	100,313	*
Oklahoma Arts Institute	195,074	11,915	Leadership Oklahoma City	835,474	54,000
Oklahoma Children's Theatre	74,937	4,234	League of Women Voters of Oklahoma	37,525	2,222
Oklahoma City Museum of Art	3,178,804	196,097	Midwest City Rotary Foundation	16,267	849
- Fee-Milligan Endowment	1,496,397	97,145	National Society of Colonial Dames of America in Oklahoma	156,946	9,717
- Carolyn A. Hill Collections Fund	286,119	0	Navy League USS Oklahoma City	52,744	3,320
- James C. & Virginia W. Meade Collections Fund	845,417	0	-E6A Squadron/Tinker Air Force Base	44,762	2,835
- Robert & Harriet Orbach Endowment	79,621	5,169	The Ninety-Nines	65,075	4,031
			99s Museum of Women Pilots	23,101	1,339

\* New Fund as of August 1, 2009

Name	Market Value 6.30.09	FY2009 Distribution	Name	Market Value 6.30.09	FY2009 Distribution
Oklahoma Center for Nonprofits	106,759	6,613	United States Air Force Academy/ John E. Kirkpatrick Fund	284,797	17,641
Oklahoma City All Sports Scholarship Relief Fund	37,578	2,328	United States Military Academy/ John E. Kirkpatrick Fund	284,996	17,654
Oklahoma City Boathouse Foundation	49,106	2,396	United States Naval Academy/ John E. Kirkpatrick Fund	284,803	17,642
Oklahoma City Foundation for Architecture	115,485	2,438	University of Central Oklahoma - Department of History and Geography/ Diane Neal Kremm	24,314	1,450
Oklahoma County Bar Foundation	225,319	11,854	- Fine Arts	72,043	4,462
Oklahoma Lions Service Foundation	131,589	8,111	- Kirkpatrick Service Awards	328,588	18,797
Redbud Foundation	35,363	1,923	- Nursing Scholarship	21,435	1,328
Rotary Club 29 Foundation	182,991	11,010	University of Oklahoma Health Sciences Center - Medical College Alumni Association Research Fund	23,772	1,376
Women of the South	16,675	1,034	- Watson Scholarship	20,981	1,215
			- Robert M. Bird Society	113,257	6,555
<b>Education: Colleges, Universities &amp; Vocational Schools</b>			University of Oklahoma Norman Campus - Bizzell Memorial Library	20,402	1,264
Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha	15,164	854	- Jerry Cooper Marching Band Scholarship	49,816	2,538
Hillel Foundation/University of Oklahoma	356,837	20,860	- Fred Jones Jr. Museum of Art	166,672	9,781
- Louis Berlowitz Lodge	8,738	541	- Naval ROTC	98,071	5,465
- B'nai B'rith Milton J. Gordon Memorial	162,517	19,195	A. Kurt Weiss Lectureship	41,564	2,000
- John Horwitz Memorial Library	15,682	971			
Langston University	639,440	57,481	<b>Education: Community Organizations</b>		
- Helen Aline Johnson Scholarship	15,027	1,020	Friends of Libraries in Oklahoma	22,491	375
- Kirkpatrick Scholarship	49,386	3,777	Friends of the Metropolitan Library System	96,647	5,927
- Al Bert Prewitt Sr. & Audrey Monroe Prewitt Endowment	13,822	938	Friends of the Mustang Public Library	29,746	1,537
-Baxter L. Tilford Scholarship	22,807	1,744	Friends of the Norman Public Library	42,440	2,615
-Rachel Starks Durham Scholarship	13,198	934	Institute of International Education	167,793	10,394
Oklahoma Baptist University	132,346	7,648	- Alice Pratt Internship Fund	131,859	8,168
- Business Program	102,937	6,373	- Colin and Brooke Lee Fund	67,682	4,192
- Hobbs Lectureship	170,931	10,583	Library Endowment Trust	226,846	11,017
- James Hurley Professorship	52,539	3,253	Oklahoma City Literacy Council	25,201	1,352
- Scholarships	68,898	4,260	Oklahoma Humanities Council	124,006	7,677
Oklahoma Christian University	950,432	54,930	Oklahomans for Special Library Services	291,321	17,302
- McBride Center for Faith & Literature Fund	20,362	500	Payne Education Center	113,411	7,010
Oklahoma City Community College	154,457	9,525			
Oklahoma City University	1,808,670	111,539	<b>Education: Preschool-12th Grade</b>		
- Benham Professorship	130,826	8,079	Calumet School Foundation	26,838	1,117
- Film Institute	25,739	1,259	Casady School	588,940	13,335
- Fine Arts Department	79,132	4,887	- Carolyn Young Hodnett Scholarship	160,779	9,927
- Law School Dean's Fund	164,181	10,113	- Eleanor Kirkpatrick Fine Arts Chair	1,235,255	55,026
- Law School Seminar Fund	365,970	11,140	- John E. Kirkpatrick Fund	768,220	46,944
- Petree School of Music Fund	92,386	5,706	- Jane B. McMillin Memorial	45,309	2,723
- Societies Fund	68,314	4,218	- Records Family Scholarship	413,687	25,544
Oklahoma State University/ School of Civic & Environmental Engineering	117,143	6,288	- Scholarships	149,236	9,099
Oklahoma State University - Oklahoma City	104,551	6,079	Celebrations Preschool	115,971	6,550
- Horticulture Center	189,007	11,642	Christ the King Catholic School	52,769	2,657
- Rumsey Garden	91,694	5,332	- James C. & Virginia W. Meade Fund	49,755	3,008
- Diane Miller Greenhouse Scholarship	20,162	250	Christian Heritage Academy	20,729	417
Opportunities Industrialization Center	205,398	12,585	Crescent Public Schools Foundation	21,501	275
Redlands Community College	44,520	2,309	Deer Creek Schools Foundation	1,248,422	74,232
- Black Baseball Endowed Fund	7,791	426	Edmond Public Schools Foundation	253,013	12,352
- Burrus Family Scholarship	59,956	2,895	- Eloise Rodkey Rees Inspirational Essay Award	16,858	708
- Casey Dell Brantley Scholarship	11,782	694	- Rees Fund	24,417	1,328
- Cathi Kennedy Scholarship	7,140	421	El Reno Public School Foundation Organization	55,551	2,986
- El Reno Chamber of Commerce			- Wilbur and Jean Gardner Scholarship	22,039	1,200
- Leslie F. Roblyer Memorial Scholarship	10,250	271	Guthrie Education Foundation	20,000	*
- El Reno Masonic Lodge #50/ RCC Aggie Club Endowed Scholarship	20,256	1,108	Heritage Hall School	648,961	40,000
- Howard and Rebecca Rainey Hutson Scholarship	31,061	1,830	- Landscaping Fund	58,680	3,000
- James Shaw Scholarship	18,811	927	- Reynolds Endowment	14,367	0
- KLR Scholarship	7,497	442	- Teacher Endowment	631,145	40,000
- Marie West Lyons Scholarship	12,496	736	Erna Krouch Preschool	60,018	3,193
- Michael Earl Cray Scholarship	8,568	505	Markoma Christian Ministries	768,127	44,773
- Renna V. Royse Scholarship	7,140	421	Bishop McGuinness Catholic High School	149,645	8,709
- Trotter-Gambel Scholarship	18,518	937	Midwest City-Del City Public Schools Foundation	285,129	15,180
- Tyler Knecht Memorial Endowed Scholarship	11,686	639	Millwood School District Enrichment Foundation	22,533	333
- Virdin Royse Memorial Endowed Scholarship	7,791	426	Moore Public Schools Foundation for Academic Excellence	107,728	6,673
- Tommy Pinkston Family Memorial Scholarship	34,991	2,167	Mount Saint Mary High School	350,139	17,215
- Scott L. Harlan Memorial Endowed Scholarship	11,261	188	- Tom Swyden Fund	12,568	779
Southern Nazarene University Scholarship	22,209	1,147	Oklahoma City Public Schools Foundation	168,460	10,381
St. Gregory's University					
-Vogt Fund	22,766	1,410			
-Scholarships for Women	110,298	6,149			
Francis Tuttle Foundation	155,850	9,123			

Name	Market Value 6.30.09	FY2009 Distribution
Oklahoma Christian School	18,953	625
Oklahoma FFA Foundation	912,129	40,744
Oklahoma Foundation for Excellence	125,101	7,706
Oklahoma School of Science and Mathematics	232,387	13,944
Positive Tomorrows	321,597	19,347
Putnam City Public Schools Foundation	372,973	22,601
Rosary Catholic School	86,713	5,077
Sacred Heart Catholic School	254,765	13,600
St. Charles Borromeo Catholic School	58,370	3,046
St. Elizabeth Ann Seton Catholic School	47,492	2,942
St. James Catholic School	189,172	11,184
St. John Christian Heritage Academy		
- Waltine Lynette Jackson Endowment	109,786	6,801
St. John's Episcopal School	132,919	7,969
- Calvin and Peola Battle Scholarship	7,499	465
- Edward Wade Dalton Memorial	11,124	689
- Sherry Rowan Scholarship	4,767	295
St. Mary's Episcopal School of Edmond	79,069	3,074
Special Care	234,551	11,582
Trinity School	78,254	4,847
Villa Teresa School	90,565	5,168
Westminster School	346,873	20,758
-Gregory L. Shadid Memorial Scholarship	100,362	6,029

### Environment & Animals Organizations

Best Friends of Pets	33,008	1,376
Choctaw Parks Foundation		
- Historical Sculpture Gardens Perpetual Care	34,586	1,563
Free to Live	246,524	13,352
Friends of Martin Park Nature Center	38,507	2,378
Morris Animal Foundation	124,101	4,874
Myriad Gardens Foundation	99,062	6,053
The Nature Conservancy/Oklahoma Chapter	192,845	11,935
- James K. Hotchkiss Fund	261,573	7,334
Oklahoma City Beautiful	188,538	10,262
- Morrison Tucker Award	34,268	2,123
- Wildflowers Fund	34,374	2,129
Oklahoma City Geological Foundation	18,046	1,072
Oklahoma Horticultural Society	74,862	4,085
Oklahoma River Foundation	355,926	17,338
Oklahoma Zoological Society	527,299	29,904
The Tree Bank	144,303	5,971

### Health-Related Organizations

Alzheimer's Association/ Oklahoma & Arkansas Chapter	26,377	1,231
American Cancer Society	140,859	8,680
American Diabetes Association	40,979	2,518
American Lung Association of Oklahoma	6,676	419
Arthritis Foundation/Oklahoma Chapter	89,679	5,102
Camp Cavett	76,642	4,307
The Children's Center	55,962	1,226
The Children's Center Foundation Fund	162,348	10,040
Children's Medical Research Institute	163,115	9,537
Community Health Center/ Mary Mahoney Memorial Health Center	93,557	4,875
Epilepsy Association of Oklahoma	105,360	6,126
Integrus Baptist Medical Center	562,288	34,756
- Baptist Burn Center	349,090	21,576
- James L. Hall, Jr. Center for Mind, Body & Spirit	118,287	6,712
Integrus Southwest Medical Center	38,182	2,365
The Leukemia & Lymphoma Society	17,944	1,113
Lupus Foundation of America/Oklahoma Chapter	23,267	1,441
Dean A. McGee Eye Institute	217,819	12,865
Mercy Health Center	182,009	11,251
National Multiple Sclerosis/Oklahoma Chapter	14,359	882
Oklahaven Children's Chiropractic Center	21,647	1,341
Oklahoma Blood Institute	16,306	851
Oklahoma Brain Tumor Foundation	17,322	988
Oklahoma Community Health Services	73,734	4,360

Name	Market Value 6.30.09	FY2009 Distribution
Oklahoma Medical Research Foundation	254,090	15,698
- Fleming Scholarship	395,434	24,467
- D. Allan & Dorothy B. Harmon Memorial Fund	73,766	4,560
- Research Fund	16,304	1,009
Oklahoma Physical Therapy Foundation	61,386	3,215
Oklahoma Safe Kids Coalition	15,606	968
Planned Parenthood of Central Oklahoma	223,503	10,774
- Cleo Cross Fund	7,266	450
Prevent Blindness Oklahoma	16,642	1,032
Referral Center for Alcohol and Drug Services	70,754	4,383
Russell-Murray Hospice	26,090	1,090
St. Anthony Hospital Foundation	268,319	16,502
United Cerebral Palsy	51,223	3,173
Variety Health Center	223,790	10,981

### History & Preservation Organizations

45th Infantry Division Museum	230,354	13,302
95th Division Foundation	43,108	2,067
Arcadia Historical & Preservation Society	18,342	1,099
Break O'Day Farm and Metcalfe Museum	14,705	860
Cleveland County Historical Society	16,258	1,009
Edmond Historical Society	38,011	2,086
Friends of Oklahoma Historical Society Archives	47,837	2,577
Frontier Country Historical Society	33,791	683
William Fremont Harn Gardens and Homestead	743,131	44,825
- 1889er's Fund	8,470	524
Lincoln County Historical Society and Museum of Pioneer History	21,577	939
Oklahoma Archaeological Survey	18,701	1,088
Oklahoma City-County Historical Society	145,691	8,375
Oklahoma Heritage Association	141,621	8,392
- Gary & Elizabeth Huckabay Scholarship	13,948	864
- Scholarship Fund	131,350	8,136
Oklahoma Historical Society	397,148	28,208
- Guthrie Carnegie Library Fund	20,797	974
- Cross S Ranch Fund	81,922	1,917
- Oklahoma History Center	741,970	45,638
- Nahzi & Annette Zudhi Fund	206,624	4,453
Oklahoma Railway Museum	26,387	1,242
Oklahoma State Firefighter's Museum	40,905	2,534
Oklahoma Westerners Indian Territory Posse	60,382	1,000
Overholser Mansion	100,339	6,194
- Dianne Gumerson Memorial	7,533	390
Preservation Oklahoma	24,405	1,493
Sillwater Museum Association/Sheerar Museum	15,520	963
Westerners International	123,661	7,183

### Neighborhood Associations

Capitol View Neighborhood Association	28,026	1,736
Crown Heights-Edgemere Heights Neighborhood Association	147,180	7,954
Edgemere Park Preservation Area	40,682	1,992
Historic Brookhaven Neighborhood Association	75,294	4,661
Mesta Park Neighborhood Association	52,878	2,738
Neighborhood Alliance of Oklahoma City	79,354	4,840
Oklahoma City Housing Services Redevelopment Corp. Positively Paseo	139,221	8,569
Putnam Heights Preservation Area		
- Anderson Family Endowment	57,196	3,188
Shartel Boulevard Development Authority	90,857	5,130

### Religious Organizations

All Souls' Episcopal Church	644,887	39,674
- Music Fund	15,787	851
4HIM - His Healing Helping Hands International Ministries	31,634	1,483
LifeChurch.tv	28,562	2,273
Sisterhood of Temple B'nai Israel	39,652	2,332
- Seligson Flower Fund	5,551	284
Sisters of Benedict	15,948	990
Temple B'nai Israel Centennial Fund	23,596	



Name	Market Value 6.30.09	FY2009 Distribution
<b>Senior Adult Service Organizations</b>		
Areawide Aging Agency	80,750	4,858
Baptist Retirement Center	123,633	7,658
Daily Living Centers	239,970	14,691
Edmond Senior Community Foundation	48,378	2,630
Foundation for Senior Citizens	48,481	3,003
Oklahoma Alliance on Aging	18,552	911
Oklahoma County Senior Nutrition Program	43,418	2,320
RSVP - Retired & Senior Volunteer Program of Central Oklahoma	76,781	4,338
<b>Social Services Organizations</b>		
Aid for Individual Development	147,686	8,582
American Legion Children's Home - Ponca City	22,652	*
American Red Cross of Central Oklahoma	164,508	9,851
Catalyst Behavioral Services	32,342	1,434
A Chance to Change	125,871	7,383
Catholic Charities of the Archdiocese of Oklahoma City	121,619	6,642
Central Oklahoma Association for the Deaf & Hard of Hearing	40,789	2,429
CARE - Child Abuse Response and Evaluation Center	59,613	3,657
CASA of Oklahoma County	24,730	1,068
Citizens Caring for Children	59,526	3,681
City Rescue Mission	69,786	3,576
Coffee Creek Riding Center	27,424	1,435
Consumer Credit Counseling Services of Central Oklahoma	19,879	1,138
Deaconess Home/Pregnancy and Adoption Services	128,422	7,957
Easter Seals of Oklahoma	104,672	6,209
EARC - Employment & Residential Centers	19,428	1,204
Exchange Club Center for the Prevention of Child Abuse	104,731	5,936
Firststep - OKC Metro Alliance	323,179	19,791
Genesis Project	74,304	4,522
Heartline	150,769	9,339
Hope Center of Edmond	29,292	1,171
Infant Crisis Services	188,768	10,968
Jesus House	146,616	7,870
Legal Aid Services of Oklahoma		
- Stan Foster Senior Law Fund	9,813	597
- Judge Eugene Mathews Fund	63,467	3,101
Make-A-Wish Foundation of Oklahoma	72,572	4,294
Make Promises Happen/Central Oklahoma Christian Camp	74,027	4,531
McCall's Communities for Life Enrichment	410,920	22,887
Meadows Center for Opportunity	161,238	9,780
Mental Health Association of Central Oklahoma	82,500	4,900
NAIC - Norman Addiction Information & Counseling	26,312	1,033
Neighbor for Neighbor of Oklahoma City	277,152	17,109
Neighborhood Services Organization	174,709	9,961
Oklahoma Baptist Homes for Children	20,341	500
Oklahoma Foundation for the Disabled	85,233	4,720
Oklahoma Foundation for the Education of Blind Children & Youth	34,175	2,117
Oklahoma Goodwill Industries	538,883	30,445
Oklahoma Halfway House	115,988	7,185
Oklahoma Lawyers for Children	29,336	1,428
Oklahoma League for the Blind	110,664	6,473
Peppers Ranch	31,418	1,104
Presbyterian Urban Mission	188,810	10,541
Rainbow Fleet	98,538	6,104
Rebuilding Together	47,193	2,305
Regional Food Bank of Oklahoma	156,470	9,112
Reliant Living Centers of Oklahoma	35,385	2,172
Dale Rogers Training Center	243,797	14,550
The Salvation Army	265,313	15,630
- Ed Leslie Fund	401,336	24,837
Scope Ministries International	90,449	5,603
Skyline Urban Ministry	219,239	12,909
Special Olympics Oklahoma	19,871	1,221
SAFY - Specialized Alternatives for Families & Youth	16,060	946

Name	Market Value 6.30.09	FY2009 Distribution
Speck Homes	538,070	33,306
Sunbeam Family Services	246,520	12,093
TEEM - The Educational and Employment Ministry	163,527	9,780
Traveler's Aid/Upward Transitions	71,755	4,376
United Methodist Boys Ranch	46,477	2,558
United Way of Central Oklahoma	218,026	10,284
Urban League of Greater Oklahoma City	43,811	2,714
Willow Springs Boys Ranch	36,610	1,701
Work Activity Center	400,087	24,769
World Neighbors	692,890	42,312
Youth Services for Oklahoma County	144,261	8,534
YWCA of Oklahoma City	96,468	5,924
<b>Youth-Serving Organizations</b>		
Big Brothers Big Sisters of Greater Oklahoma City	129,888	7,974
Boy Scouts of America - Last Frontier Council	597,436	24,789
Boys & Girls Club of Oklahoma County	303,548	10,332
Camp Fire USA - Heart of Oklahoma Council	206,946	12,796
Chesapeake Swim Club	126,889	7,296
Denny Price Family YMCA of Enid	16,416	1,078
Fellowship of Christian Athletes	161,009	9,844
- Stephen B. Payne FCA Scholarship	99,889	6,188
Girl Scouts - Western Oklahoma	126,958	7,558
Junior Achievement of Greater Oklahoma City	118,135	6,975
Oklahoma City Police Athletic League	38,465	2,383
Salvation Army Boys and Girls Club of Oklahoma City	103,831	6,424
Whiz Kids/City Care	17,108	960
YMCA - Oklahoma City	328,177	20,259
- Camp Classen	374,570	22,778
- Camp Classen Eberly Scholarship Endowment	184,271	11,077
- Downtown	78,305	4,826
- Eastside	68,289	4,226
- Northside	8,186	486
Youth Leadership Exchange	45,400	2,319



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## Charitable Organization Endowment Program



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## Scholarship Program



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## Lawton Community Foundation

## 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 column is 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 6.30.09	Distribution
Mike Allen Memorial Education	36,543	1,000
Aaron Alley Memorial Scholarship	32,026	1,500
Hal Almen West OKC Rotary Scholarship	1,380,417	62,000
American Society of Civil Engineers Scholarship	19,035	
American Society of Landscape Architects Scholarship	30,663	500
BSO Ivy Foundation	22,923	2,000
John Blaess Memorial Scholarship	8,478	500
Patrick S. Bonds Memorial Scholarship	32,173	1,000
Vinita F. Boyer Scholarship	74,852	4,401
Alberta Brannon Scholarship	8,489	
Dr. Eugene S. Briggs Memorial Scholarship	94,341	13,576
Capitol Hill High School Scholarship	54,166	500
Elizabeth E. Carlson Scholarship	330,141	4,000
Casady Class of 1996 Scholarship	38,606	2,428
Central High School Alumni Association	176,893	10,500
Kimberly Kay Clark Naval Reserve Association Scholarship	17,990	1,087
Classen 55 Scholars	86,950	500
Classen Awards Foundation	90,581	5,000
Classen Class of 1945 Scholarship	32,267	1,000
Ralph Clinton Scholarship - Sales & Marketing Executives	43,291	500
Cox Connects Scholarship		30,000
Jean Hawley Curtis Scholarship	26,196	1,500
Harley Custer Memorial Scholarship	38,205	1,000
Dana Corporation Scholarship	93,621	4,750
Dortha Dever Business Scholarship	44,207	1,000
Durant Community Scholarship	65,698	2,000
Early Childhood Association of Oklahoma Scholarship	24,782	700
Everett Foundation Scholarships	88,356	4,000
Barbara Fagin Award/Christmas Connection	28,497	1,000
Brunel Faris Art Exploration Scholarship	16,810	*
Wauhillaue Austin Gale Memorial Scholarship	20,048	1,000
Ema Garcia Memorial Scholarship	18,363	1,127
Elsie Mae (Nat) Glosemeyer Memorial Scholarship	33,329	500
Freda Poole Grayson Scholarship	15,851	900
Holistic Health Care Scholarship	18,375	225
Geneva Hood Award/Casady School	50,292	3,000
Hudiburg Family Fund Scholarship	61,521	9,000
Iron Workers Local 584 & Signatory Contractors Scholarship	42,615	2,000
Vic Jackson Scholarship Fund - Oklahoma Pilots Association	32,634	1,532
Dennis James Scholarship - Deer Creek Baseball Fund	27,792	500
Miles Jenkins Memorial Scholarship	16,000	500
Kay Jewell Scholarship	12,098	500
Jones High School Scholarship	34,032	1,000
Friends of Kim Jones-Shelton Scholarship	14,482	500
Junior League - Mary Baker Rumsey Award	43,917	3,000
Dr. Edith King Mental Health Court Scholarship	21,120	
Rev. Kenneth King Memorial Scholarship	41,559	4,000
Kirschner Trust Scholarship	166,101	9,514
Valerie Koelsch Memorial Scholarship	37,440	1,000
Wann & Clara Langston Scholarship	124,647	7,419
Lawton Noon Lions Club Scholarship	84,812	5,000
Lawton - Oklahoma Arts Institute Scholarship	21,187	1,000
McGee Foundation Scholarship	423,519	24,440
Charles C. and Mary Lou Miles Scholarship	18,552	*
Moore High School Alumni Association Scholarship	27,496	1,376
Moore High School Alumni Association		
-George and Doral Hopper Scholarship	17,530	2,321
-Bennie Raine Scholarship	16,496	1,024
Gary M. Moore, M.D. Dance & Arts Management Scholarship	117,176	7,000
Gary M. Moore, M.D. Great Plan Scholarship	2,413,210	10,000
Northwest Classen High School Class of 1956 Scholarship	43,009	1,500
Oklahoma Engineering Foundation Scholarship	118,778	6,875
Oklahoma Goodwill Industries Abilities Scholarship	32,399	4,000
OKC Northwest Lions Club Scholarship	21,511	1,000

\* New Fund as of August 1, 2009

Orner-Cook Scholarship	31,654	500
OSU Agricultural Education Scholarship, Inc.	347,159	20,851
Deborah R. & Wayne A. Parker Scholarship	106,229	6,596
Senator Homer Paul Memorial		
Scholarship for Pauls Valley High School	31,725	
Pi Beta Phi Alumnae Club Scholarship	87,697	6,000
Pilot Club Scholarship	7,806	487
Floy I. Pinkerton Vocal Music Scholarship	9,184	500
Larry W. Roach Leadership Award	17,923	1,000
Jeffrey Rogers Education Memorial Scholarship	45,962	2,000
Will Rogers Air National Guard Scholarship	37,355	2,192
Seay A. Sanders Jr. Scholarship	15,998	1,000
St. James School		
-Lorene Sherman Memorial Scholarship	22,120	3,000
-Tracy Wilson Memorial Scholarship	31,161	2,400
Mary & Spencer Sessions Teaching Award	24,200	1,000
Joe B. Smith Memorial Class of 1942 Scholarship	63,713	1,000
Robert V. Smith Memorial Scholarship	23,707	(500)
Andersen Spraberry - Perry High School Endowment	92,600	1,500
Andersen Spraberry - Prague High School Endowment	90,721	1,500
Pete & Lela Stavros Scholarship	39,076	2,500
Wendell Steward Scholarship	16,248	1,000
Troop 193 Leadership Scholarship	67,491	4,000
University of Oklahoma School of Music		
-Dorothy Detrick Kendall Piano Scholarship	27,639	1,000
-Alice Everett Cello Scholarship	55,578	4,000
Marie Welch Scholarship - IIAO Insurance Foundation	58,918	3,649
Western Oklahoma Building Trades Scholarship	19,915	500
Westside Lions Club Scholarship	8,904	650
James Whitfield Employee Scholarship	19,580	*
Dean Wild Memorial Scholarship	21,289	500
Deral E. Willis Scholarship	15,018	1,000
James M. Wilson Scholarship	17,337	1,500
Mildred and William Young Scholarship	24,673	1,000
Dan Zanowiak Memorial Scholarship	29,237	1,000

## Lawton Community Foundation Charitable Organization Endowments

The Lawton Community Foundation is an affiliated organization of the Oklahoma City Community Foundation. 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 6.30.09	Distribution
Arts for All	19,226	1,196
Cache School Scholarship	77,809	3,737
Comanche County Memorial Hospital Foundation	15,702	978
Field Artillery OCS Alumni Chapter	32,504	1,296
First United Methodist Church Foundation, Inc. of Lawton	90,726	4,826
Giddy Up 'N Go	40,126	2,334
Great Plains AMBUCS-Kid's Zone	16,285	1,014
Robert E. Greiner School for the		
Handicapped of Comanche County	25,558	1,589
Hackberry Flat Foundation	30,785	1,839
Holiday in the Park	16,647	1,046
Lawton Community Theatre	14,412	898
Lawton - Family YMCA	14,545	907
Lawton Food Bank	20,302	625
Lawton-Fort Sill Armed Services YMCA		
Gene Love Endowment	161,560	8,518
Lawton Noon Lions Club Scholarship	84,812	5,000
Lawton Philharmonic Orchestra	14,369	896
Lawton Public School Foundation	243,877	14,930
Museum of the Great Plains	21,615	1,330
Oklahoma Arts Institute Scholarship	21,187	1,000
On the Chisholm Trail Association Heritage Center	19,589	1,144
Southwest Oklahoma Genealogical Society	15,882	989
United States Field Artillery Association Foundation	46,702	1,901
United Way of Lawton/Ft. Sill	25,334	1,465

# How You Can Support an Endowment

All of the organization endowments and scholarship funds listed on pages 5-9 serve an important role within the community and their endowment funds at the Oklahoma City Community Foundation help to sustain their long-term viability. You can further help these organizations with a gift to their fund through the options outlined below. For information on a deferred charitable gift from your estate, please visit [www.occflegacy.org](http://www.occflegacy.org) or contact Joe Carter at 405/606-2914 or [j.carter@occf.org](mailto:j.carter@occf.org).

## Online Gifts

We offer a secure online giving service that accepts gifts to permanent endowments from donors using an American Express, MasterCard or Visa credit card. To make an online gift, please visit [www.occf.org/donate](http://www.occf.org/donate).

## Cash

Cash is one of the easiest ways to make a charitable contribution. A cash contribution to a charitable organization endowment can be in the form of cash, check, money order or a cashier's check.

## Real Estate

Real estate may be given at appraised value. If appreciated, long-term capital gains tax may be avoided on the real estate appreciation if the property is contributed directly to the Oklahoma City Community Foundation. Gifting real estate may allow you to preserve liquid assets while maximizing your charitable contributions.

## Business-related Assets

We are able to accept gifts of individually-owned business assets such as closely-held C-corp. and S-corp. stock, partnerships and LLCs.

## Stocks, Bonds and Mutual Funds

If appreciated, marketable or closely-held securities such as stocks, bonds and mutual funds can offer you significant tax savings while maximizing your charitable contributions. The securities may be given so that you receive an income tax deduction equal to the fair market value of the donated assets while avoiding the long-term capital gains tax. We maintain accounts at most brokerage firms and can arrange for the transfer of the donated securities.

## Oil and Gas Interests & Royalty Interests

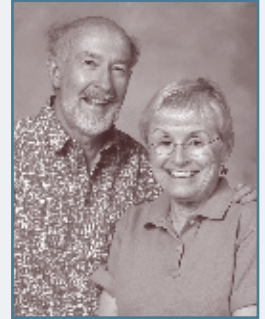
Both oil and gas royalty interests may also be donated to the Oklahoma City Community Foundation for the benefit of a charitable organization endowment. The contribution of oil and gas interests may allow for the preservation of liquid assets while maximizing the charitable contributions.

## Life Insurance

Life insurance can be an effective means to fund a charitable gift without significant outlays of cash. Simply designate a charitable organization endowment, an advised fund or scholarship endowment as the beneficiary.

## Giving now and later

Larry and Leah Westmoreland love music and the performing and visual arts. Frequent travelers, the couple often include a cultural activity or visit to a historical site on their trips. Since 1997, Larry and Leah have made gifts to the Oklahoma City Community Foundation to benefit the endowments of arts organizations including Oklahoma Shakespeare in the Park and the Fine Arts Institute of Edmond.



A graduate of the University of Colorado, Larry is an emeritus professor of chemistry at the University of Central Oklahoma where he has taught since 1969. Leah, who earned a master's degree from Michigan State University, taught high school German for four decades that included 33 years teaching at Bishop McGuinness High School. "We were drawn to the Oklahoma City Community Foundation because of its strong reputation and the ease of creating an advised fund," Leah says.

In 2007, the couple established a Legacy Fund and they have included a bequest in their estate plans that will eventually benefit the fund, ensuring their continued support for the arts and other charitable interests.

## Financial & Administration



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# John Kirkpatrick Centennial Endowment Challenge

In 2008, the Oklahoma City Community Foundation and the Kirkpatrick Family Fund launched a matching grant opportunity in recognition of the 100th anniversary of the birth of our founder, John E. Kirkpatrick. The John Kirkpatrick Centennial Endowment Challenge was significant in both its meaning and the opportunity to increase the endowments of both charitable organizations and scholarship funds. Mr. Kirkpatrick funded seven endowment matches over a 20-year period beginning in 1979. He truly loved to see the endowments funds grow and he especially liked that the match challenges attracted new donors for the organizations.

The grant opportunity offered participating endowments – both for charitable organizations and scholarship funds – a dollar-for-dollar match up to \$5,000 for contributions made to their funds at the Oklahoma City Community Foundation between February 1 and December 31. In addition, the Kirkpatrick Family Fund also offered a larger match opportunity – the 100th Birthday Celebration Challenge – to 23 organizations with specific endowment building plans. These organizations had until June 30, 2009 to

## John Kirkpatrick Centennial Endowment Challenge



complete their matches. Between the two match opportunities, 280 charitable organization endowments and scholarship funds participated and increased their funds by nearly \$4 million thanks to more than 3,000 gifts. The success of both challenges carried on the legacy of Mr. Kirkpatrick and we believe he would be very pleased with the results.

On behalf of the Trustees of the Oklahoma City Community Foundation and all of the participating funds, we would like to thank you again for your gifts toward these endowments. The idea of building endowments for the benefit of the community is a central piece of our mission. We appreciate the willingness of so many individuals to participate in this effort not only this past year but in years past.

## Including Charitable Giving in Your Estate Plans

At the Oklahoma City Community Foundation, you have many options to include charitable giving in your estate plans. The options outlined below are designed to help you make charitable gifts while enjoying tax benefits and preserving financial security for yourself and loved ones. They also make it possible for your generosity to continue making a difference for many generations. For more information, contact Joe Carter at 405/606-2915.

### Charitable Gift Annuities

A charitable gift annuity (CGA) provides individuals 55 years or older with not only income for life but also the peace of mind of making a difference through a lasting gift to the community. Through a CGA, you can make a gift with cash or other assets of at least \$20,000, receive income for life and, at the end of the annuity, the remaining assets will go to the charitable fund or funds of your choosing. We offer six CGA options.

### Charitable Remainder Trusts

A charitable remainder trust allows you to place assets in a trust that pays annual income to you or a beneficiary for life or a term of years. You can 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 estate, reducing subsequent estate taxes. Upon the trust's termination, the remaining assets will benefit an existing endowment or advised fund.

### Charitable Lead Trusts

A charitable lead trust allows you to transfer assets to the Oklahoma City Community Foundation that then pays a percentage of the assets' value to an endowment you've designated. At the end of the trust term, the remaining assets are passed on to designated heirs. Charitable lead trusts offer several advantages including 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.

### Retirement Plan Assets

Retirement plan assets are subject not only to estate taxes, but also income taxes. To reduce this burden on heirs and to create a charitable legacy, you can use any retirement plan asset to maximize charitable contributions by establishing an Advised Fund at the Oklahoma City Community Foundation. Your heirs can serve as advisors to the fund, ensuring that your charitable interests are continued into the future. NOTE: If you will be 70 ½ years of age in 2009, you may want to consider a charitable IRA rollover.

### Bequests

With a bequest, you can designate a percentage, the residual or their entire estate to benefit an existing fund or to establish a new fund. This option may provide you and your family with substantial reductions in federal estate taxes. We offer sample bequest language at [www.occf.org](http://www.occf.org).

### Legacy Giving offers important new tools for charitable giving

In 2009, the Oklahoma City Community Foundation added a substantial new feature to our Web site that is devoted entirely to information and tools for estate planning. The section, Legacy Giving, provides important resources for both donors and their professional advisors to create charitable giving plans that benefit both the donor and their community. We encourage you to sign up to receive electronic newsletters that provide timely news on the topic of estate gifts. In addition, an easy philanthropic calculator can help determine the tax implications of certain gifts such as charitable gift annuities and charitable trusts. Visit [www.occflegacy.org](http://www.occflegacy.org) for more information or contact Joe Carter at 405/606-2915.

# Celebrating Giving Back to the Community

Our 40th anniversary in 1969 offers a reason to celebrate and acknowledge the impact we've helped donors make over the past four decades. In place of galas and speeches to mark this special milestone, we focused our celebration on several key projects that gave back to the community on a variety of levels. Below are highlights of 40th anniversary projects:

## 2009 Guidance Counselor Summer Institute

The Central Oklahoma Guidance Counselor Network is a vital part of our Trustee Scholarship Initiative and provides an important support system for the participating counselors representing 50 high schools. Through the network, we provide free resources including workshops so the counselors can utilize the information to encourage their students to aspire to higher levels of educational achievement after high school and to explore a broader range of opportunities.

In 2009, we coordinated the Guidance Counselor Summer Institute, a two-day training workshop at Meinders School of Business on the campus of Oklahoma City University. The institute was taught by members of the College Board and was open to all network counselors at no cost. During the institute, the instructors covered relevant topics such as working with undocumented, tribal and first-generation students, writing letters of recommendation and communicating with colleges and universities. Thirty-five counselors attended the institute.

"I found this to be extremely valuable as I have only been in the profession for one year," said participant Ashley B. "I will definitely have a better understanding of what I can do for my students in the future."

## Get Reading Oklahoma

Recent statistics show that more than 140,000 adults living in Oklahoma County read at or below the basic literacy level. To address the situation and to find a way to reach a greater number of adults, the Oklahoma City Community Foundation purchased the broadcast rights to two innovative adult literacy television series created by PBS LiteracyLink – TV411 and GED Connection – and arranged to have them broadcast statewide both on OETA and Cox Cable.

TV411 is a 30-episode television series created by PBS that is designed to give adults strategies for managing their family's health and finances while improving their literacy skills so they can serve as their own best advocates. The episodes use everyday situations in order to improve and expand vocabulary, calculate sales prices or interest rates and understand family health and nutrition.

GED Connection is a 39-episode program that helps adults who are studying for the GED exam. The programs include all five subject areas covered on the exam. Episodes for both programs are 30 minutes in length. Get Reading Oklahoma has brought together a wide range of partners for whom we are very thankful: Oklahoma Department of Libraries, Central Oklahoma Workforce Investment Board, Oklahoma Department of Education, the Metropolitan Library System, the Oklahoma Department of Corrections and Tyler Media. For more information, visit [www.getreadingoklahoma.org](http://www.getreadingoklahoma.org).

"The Get Reading Oklahoma materials are a great complement to our tutoring program," says Mary Young, director of Project Read, a nonprofit organization based in Edmond, Okla., that provides tutoring for adults. "They are relevant, repeatable and something a learner can utilize on their time schedule. And best of all, they come in a medium that really speaks to the adult population."



## "Putting Down Roots"

In 2003, the Oklahoma City Planning Department published "Putting Down Roots," a 116-page guide to choosing and taking care of trees best suited for central Oklahoma landscapes. The guide features full-color photos and information about the more than 50 trees appropriate for Oklahoma landscapes and is made available free of charge to city residents. In 2009, the department updated the publication and a grant from the Oklahoma City Community Foundation will ensure the publication remains free to the public. We will dedicate the publication to one of our donors, Margaret Annis Boys.

## Downtown In December

The Oklahoma City Community Foundation is the 2009 presenting sponsor of the Free Museum Sundays during Downtown in December, an annual celebration produced by Downtown OKC since 2001. The celebration offers family-friendly activities throughout a 10-block area of the downtown area. In 2009, Free Museum Sundays will involve four museums instead of two. The participating museums are the Oklahoma City Museum of Art, the American Banjo Museum, the Oklahoma City National Memorial and the Oklahoma Heritage Museum. During the five-week Downtown in December event, each museum will be open free of charge one Sunday and on the final and fifth Sunday, all four will be open to the public at no costs.

Downtown in December 2009 begins November 27. For more information, visit [www.downtownindecember.com](http://www.downtownindecember.com).