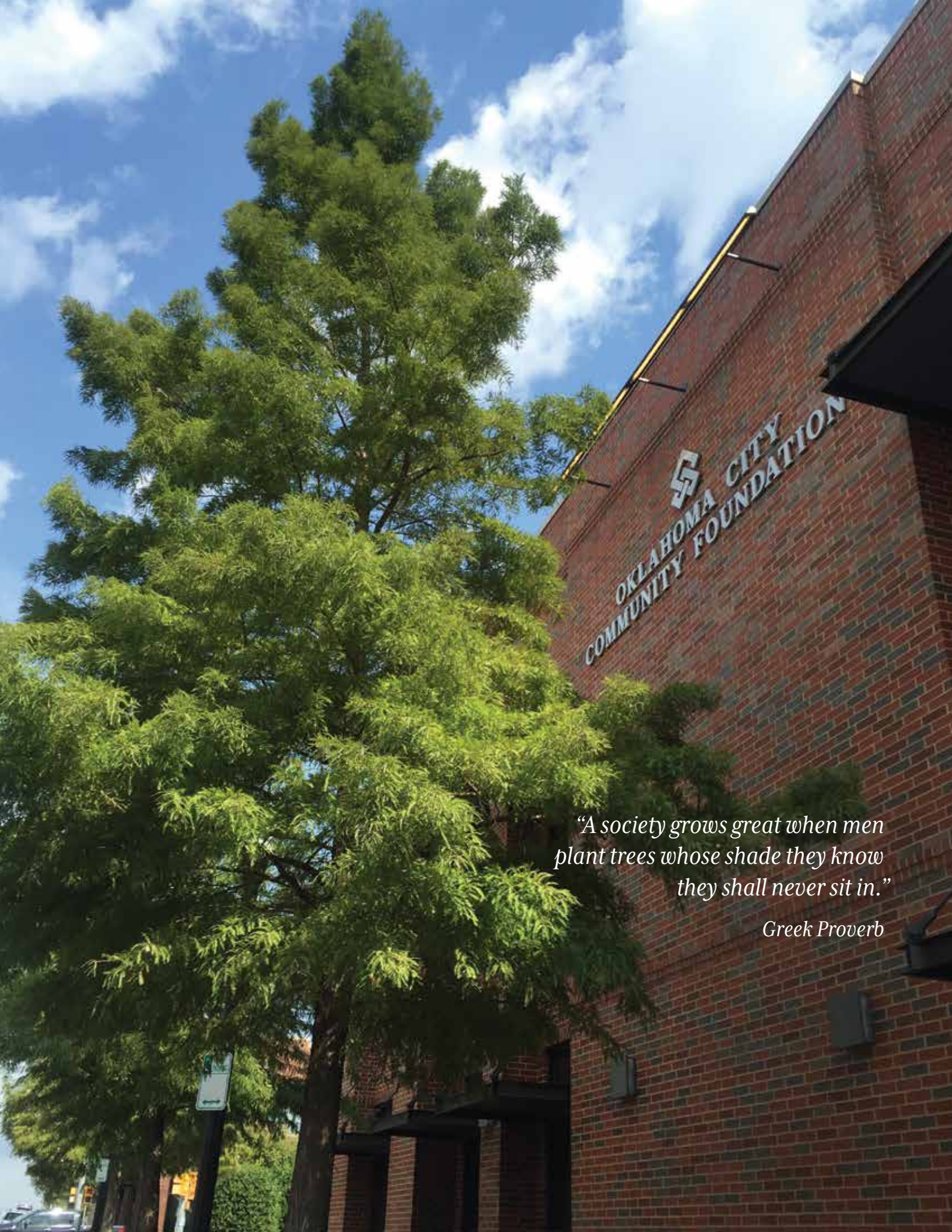




OKLAHOMA CITY
COMMUNITY FOUNDATION

— 2016 —
Annual Report

GROWING *Philanthropy*  | occf.org



OKLAHOMA CITY
COMMUNITY FOUNDATION

*“A society grows great when men
plant trees whose shade they know
they shall never sit in.”*

Greek Proverb

Dear Donors and Friends,

Forty-seven years ago, John E. Kirkpatrick and a group of forward-thinking community leaders took a bold and pioneering step. Embracing an innovative idea of securing lasting charitable support through endowment, they created a foundation for the community. They planted the seeds of support that grew into an enduring community resource, enabling caring individuals to make a charitable impact for years to come.

Our 2016 Annual Report recognizes our community's generous donors and highlights the collective impact we've made during the fiscal year that ended June 30, 2016. But it also shares the stories of donors who believe that together we have the power to make a real difference.

In Fiscal Year 2016, \$34 million in grants benefited 1,800 charitable organizations and the thousands of individuals they serve. In addition, \$1.5 million in scholarships helped 600 students further their education. This impact in the community was made possible through \$44 million in gifts received from 1,700 donors.

However, we strive to do much more than distribute grant dollars. By bringing together partner organizations and donor resources, we are creating effective solutions that benefit the whole community. During the last fiscal year:

- We helped make major improvements to 14 public parks and school playgrounds in central Oklahoma, creating more usable public spaces for the community.
- Through our Wellness Initiative, we are taking action to create a healthier community and supported nine projects to encourage healthy lifestyles among central Oklahoma residents.
- Our GiveSmartOKC.org website connects donors with more than 270 area charities to encourage informed charitable giving, helping them make a greater impact in the community.

As we continue to grow philanthropy in our community, the programs, services and support we provide have also grown significantly. In August, we announced plans to expand our office facility, allowing us to continue to meet the growing needs of our community and requests for use of our meeting space.

Nearly a half-century later, we remain committed to the original vision of our founders. We believe that philanthropy is a collaborative effort and that by working together, we can add value to your philanthropic passions to create lasting change for our community.



Bond Payne, Chairman



Nancy B. Anthony, President



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A Charitable Legacy Continues

William T. Payne is known for his success in the Oklahoma oil and gas industry, but it is his philanthropic legacy that has made the greatest impact on his family. Through his will, he gifted his company Payne Petroleum to establish the William T. Payne Fund in 1981 at the Oklahoma City Community Foundation.

“My children always knew this was a special gift their grandfather left us,” said daughter-in-law Nancy Payne Ellis. “I was able to involve my children in charitable giving at a young age, and we share that as a family.”

Nancy and her four children, Kathy Brown, Nan Payne, Bond Payne and Angela Ferguson, have carried on Mr. Payne’s legacy by supporting organizations he cared about through the William T. Payne Fund. The fund has awarded more than \$3.7 million to a number of charitable organizations including Westminster Presbyterian Church, Boy Scouts of America, Oklahoma Christian University and Mercy Health Foundation.

The family’s connection to Mercy dates back to the 1960s, when Mr. Payne became the first layperson to serve on the hospital board. At the time, the hospital was located in downtown Oklahoma City, and later moved to its current location in northwest Oklahoma City under the direction of Sister Mary Coletta Massoth.

“Mr. Payne was a friend of Sister Coletta’s, and he encouraged her to follow her vision of relocating the hospital,” said Kay Oliver, executive director of Mercy Health Foundation Oklahoma City.

When the hospital announced plans to build a cancer center in honor of Sister Coletta, the Payne family knew their patriarch would have wanted to support the project. A gift from the William T. Payne Fund helped fulfill Sister Coletta’s final wish of opening a comprehensive cancer center. The Coletta Building opened in June 2016 and is home to all of the hospital’s cancer and breast services.

“Our delivery of oncology services was fragmented, and patients would have to walk all over campus to receive care,” Kay Oliver said. “The cancer center brings all of these services together under one roof.”

Thanks to the charitable legacy of her friend William T. Payne, Sister Coletta’s ministry will continue to provide compassionate care to our community for years to come.

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ues to Enrich the Community



Nancy Payne Ellis and daughter Kathy Brown by the Payne Family Healthy Staircase in the Coletta Building at Mercy Hospital Oklahoma City. The Coletta Building is home to Mercy's new comprehensive cancer center that opened in June 2016.

Photo by Brandon Snider

Special Donors



The donors and funds listed as Special Donors are individuals, families and businesses who have made cumulative gifts of \$500,000 or more to permanent endowment funds administered by the Oklahoma City Community Foundation. Special Donors are listed with the year of initial gift.

7-Eleven Stores | 2010

Established in honor of employees, the fund supports donor advised distributions.

O. June Allen | 1987

The widow of oilman Featherstone H. Allen, Mrs. Allen left a gift from her estate to support the Fund for Oklahoma City.

H.W. Almen/West OKC Rotary Scholarship Fund | 2004

Businessman H.W. Almen was a longtime member of the West OKC Rotary Club. A bequest in his estate left a \$1.3 million gift to the club to establish a scholarship program for Oklahoma students.

Annie & Isaac Bloom Educational Scholarship | 2001

Esther Bloom was a generous yet anonymous supporter of Emanuel Synagogue. Through an estate gift, a fund was established in her parents' name and supports the education of the congregation's children.

Margaret Annis Boys | 1991

A \$1.5 million bequest from her estate created the Margaret Annis Boys Trust that is used for beautification projects in public parks, medians and school grounds in Oklahoma County. Read more on page 50.



Thomas & Patricia Dix Brewer | 1992

The couple made a gift of an insurance policy to establish an advised fund that supports the promotion and values of justice and peace.

Jack Canine Fund | 2008

The former owner of an Indiana-based manufacturing company, Jack Canine helped to establish the American Banjo Museum that is located in Oklahoma City. He created an endowment to support the museum's operations.



B.C. Clark Family Fund | 1992

The B.C. Clark family established an advised fund to celebrate the 100th anniversary of B.C. Clark Jewelers, an Oklahoma City-based business with three locations. The fund supports a number of charities through grants recommended by the family.

W.H. Crocus Fund | 1998

An anonymous donor established this endowment after witnessing the relationship between a guide dog and a blind man. This fund supports the training and availability of guide dogs for the visually impaired and is named for the first guide dog sponsored by the fund.

Dortha Dever | 2007

Oklahoma City businesswoman Dortha Dever first established the Dortha Dever Business Scholarship at the Oklahoma City Community Foundation in 2007 to support female students pursuing a business degree at Oklahoma City University. Following Dortha's death in 2015, a gift from her trust increased the awards and created an advised fund to support the charitable causes Dortha cared about.

Emanuel Synagogue | 2003

Congregation Emanuel was founded in Oklahoma City in 1904 and is a traditional, egalitarian congregation affiliated with The United Synagogue of Conservative Judaism. The fund was the first endowment established at the Oklahoma City Community Foundation to benefit a faith community.

Irene P. & Samuel F. Frierson Educational Trust | 1997

The fund was established by the Frierson Educational Trust to provide scholarships to students attending an Oklahoma college. Scholarships are awarded through our Trustee Scholarship Initiative.

Edward King Gaylord Scholarship Fund | 1970

Mr. Gaylord, founder of the Oklahoma Publishing Company, established this endowment fund prior to his death and further funded it through a bequest in his estate. The fund supports scholarships awarded through the Trustee Scholarship Initiative.



David W. Gorham | 2001

Longtime associate headmaster at Casady School, David W. Gorham supports several charitable organizations including the Boys and Girls Clubs of Oklahoma County, the Regional Food Bank of Oklahoma and the Nature Conservancy of Oklahoma.

Robert A. Herring Trust | 2006

Mr. Herring was a longtime newspaper publisher in Chelsea, Oklahoma. The endowment was established through a bequest in his estate to support medical research related to Parkinson’s disease and genetic disorders.

G. Ed Hudgins Family Fund | 1989

Mr. Hudgins was a founding partner of the Oklahoma City architectural and engineering firm HTB, Inc. The fund supports donor advised distributions and a scholarship at the Oklahoma State University College of Architecture and Engineering.

Ronnie & Shahnaaz Irani Foundation | 2015

Originally from Bombay, India, Ronnie Irani first came to Norman, Oklahoma in 1977 to attend the University of Oklahoma. Ronnie is founder, president and CEO of RKI Exploration and Production, an independent oil and natural gas company. He and his wife Shahnaaz established the fund to support charitable causes in Oklahoma and beyond.

William M. & Janet S. Johnson Scholarship Fund | 1987

Mr. Johnson was a native of Minco, Oklahoma, and a longtime employee of Gulf Oil. The fund was established through bequests from Mr. and Mrs. Johnson’s estate to support scholarships for graduates of Minco High School and nurses in Oklahoma.

Joan Kirkpatrick | 1972

The only child of John and Eleanor Kirkpatrick, Joan was chair of her family’s private foundation and focused its resources on areas of personal interest such as animal welfare and the environment. Prior to her death in 2009, Joan established several endowment funds to benefit her favorite animal welfare organizations.

John E. & Eleanor B. Kirkpatrick | 1969

Ten years after establishing a private foundation, the Kirkpatricks established the Oklahoma City Community Foundation in 1969 to provide opportunities for donors in the community to support charitable causes and organizations.



Mr. Kirkpatrick served as the founding President for the first 10 years and again as a Trustee from 1985-91. Over a period of 20 years, the Kirkpatricks supported a challenge match program for charitable organizations with funds at the Oklahoma City Community Foundation to encourage donors to support and help increase the endowments. In all, the Kirkpatrick Challenges generated more than \$58 million in endowment assets for more than 230 organizations. Mrs. Kirkpatrick died in 1998 and Mr. Kirkpatrick in 2006.

Lawton Retail Merchants Association | 1998

The Lawton Retail Merchants Association was the primary funding source for the establishment of the Lawton Community Foundation, an Affiliated Fund of the Oklahoma City Community Foundation.

Edward P. & Norma Leslie Fund | 2004

Ed Leslie spent more than 60 years in the insurance industry in Oklahoma City. Established by a bequest from the couple’s estate, the fund supports a variety of the charitable interests they shared during their 62-year marriage. The fund also benefits the Fund for Oklahoma City.

McGee Foundation Fund | 2001

The fund supports scholarships for first generation college students and foster children through our Trustee Scholarship Initiative. Dean A. McGee was a co-founder of Kerr McGee and was one of nine original Trustees of the Oklahoma City Community Foundation. His daughters Marcia and Patricia continue support of this scholarship.

Bill & Sally McNutt Foundation | 2005

Janet McNutt transferred the assets of her late parents’ private foundation to the Oklahoma City Community Foundation to establish an endowment to support the family’s charitable interests.

Milton & Mary Meier Fund | 2005

Established by a bequest from Mrs. Meier’s estate, this fund supports the Fund for Oklahoma City. In 1993, Mrs. Meier created the Lt. Felix Christopher McKean Fund in memory of her brother who was killed in World War II. A bequest in her estate established funds in honor and memory of the following family members: David Felix McKean, Felix Christopher McKean, Alice and Karl Meier, Christina Moore McKean and Mary and Christopher Moore.

Ruth Mershon Fund | 2001

After graduating from the University of Oklahoma’s College of Medicine in 1949, Ruth Mershon practiced anesthesiology until her retirement in 1996. Through a bequest of retirement assets and other estate gifts, an endowment fund was established to support scholarships and other charitable purposes.



Paul M. Milburn Foundation | 2005

Longtime businessman and real estate investor in Shawnee, Oklahoma, Mr. Milburn transferred the assets of his private foundation to establish an advised fund to support his charitable interests. In addition, he has established several endowments supporting school initiatives and sustainable agriculture.

Dr. Gary M. Moore Fund | 1999

Known for his generosity, enthusiasm and unwavering support of his alma mater, Oklahoma City University, Dr. Gary Moore dedicated much of his energy to giving back to the school. He established funds to support scholarships for liberal arts students as well as students in the Dance and Arts Management program.

Donna Nigh Foundation | 1996

The foundation was established in 1985 in recognition of Mrs. Nigh's commitment and work on behalf of Oklahoma's developmentally disabled citizens. The foundation's assets were transferred in 1996 to the Oklahoma City Community Foundation. The fund supports grants to provide adaptive equipment for developmentally disabled Oklahoma residents.



Oklahoma City Jewish Community Foundation | 1999

Several funds were transferred by the Oklahoma City Jewish Community Foundation to the Oklahoma City Community Foundation in 1999. The earnings support the Jewish Federation of Greater Oklahoma City and a wide range of activities. Funds within the Oklahoma City Jewish Community Foundation endowment include:

- Ron & Julie Arvine Trust Fund
- Michael & Anita Barlow Family Fund
- Sherry K. Barton Family Fund
- Jerry B. & Jacqueline Leibs Bendorf Fund
- Sharon F. & James Ike Bennett Fund
- Robin & Rick Black Family Fund
- Lori & Jeff Blumental Fund
- Morris Butkin Fund
- Charles Caylen Holocaust Memorial Fund
- CommUNITY Partnership Fund
- Lawrence H. & Ronna C. Davis Family Fund
- Dor L'Dor Fund
- Richard H. & Adeline Fleischaker Fund
- Founders Fund
- Justin & Linda Gardner Fund
- Sylvia & Jack Golsen Family Fund
- Robert & Virginia Greenberg Fund
- Holocaust Education Fund
- Israel Fund
- Carrie Jacobi Fund
- Karchmer Charitable Trust Fund
- Marsha Segell Karchmer LOJE Fund
- Majir & Many Kornblit and Michael & Joan Korenblit Holocaust Fund
- Harry & Hedra Merson Family Fund
- Jack & Johanna Price Fund
- Schneider Family Fund
- Shanker Family Fund
- Shanker Frank Israel Friendship Fund
- Ben Shanker Family Scholarship Fund
- Janice & Joe L. Singer Family Fund
- Joe B. & Ann G. Singer Fund

- Charles & Nikki Singer Fund
- Joe L. Singer Memorial Fund
- Glenna & Richard Tanenbaum Fund
- Mary & Larry Trachtenberg Fund
- Marvin & Martha Weiss Fund
- Robert & Tammy Weiss Family Fund

Clarence E. Page Fund | 1987

An aviation pioneer, Clarence E. Page established the Oklahoma Air Space Museum in 1980 and was the principal donor. Distributions from several funds he established continue to support the aviation exhibits at Science Museum Oklahoma.



William T. Payne Fund | 1976

From humble beginnings, William T. Payne would go on to establish Big Chief Drilling and become a well-respected and successful oil man. Mr. Payne left a bequest in his estate that established an endowment fund from which three generations of his family continue to recommend grants. Read more on page 2.

F. M. & Thelma Petree Fund | 1977

Mr. Petree established Liberty Mortgage and was a past Trustee of the Oklahoma City Community Foundation. Contributions support Oklahoma City University and other charitable organization endowments.

Winona S. Presley Fund | 1999

Winona Shingleton Presley worked as a teacher and her love of education motivated her to establish endowments for the Oklahoma 4-H Foundation, the University of Central Oklahoma and Oklahoma City University. A bequest from her estate supports the Fund for Oklahoma City.

Ramsey Family/Blue & Gold Sausage Fund | 1979

The founders of Blue & Gold Sausage Co., Don and Willadean Ramsey and their family established an advised fund to perpetuate their support of agricultural education scholarships and programs.



Edna Ratliff Fund | 2001

One of the first female trust officers in Oklahoma, Edna Ratliff worked for Liberty National Bank for 48 years. Contributions from her estate, including mineral interests, support several health-related organizations and other community needs.

Records-Johnston Family Foundation | 1979

Ross Johnston established the foundation in honor of his father, Willard Johnston, who made the 1889 Land Run and started the first commercial bank in Shawnee. Ross helped to establish what is now known as The Midland Group that is headed by his son-in-law, George J. Records. Contributions support Casady School and other education and scholarship funds.

Bert R. Reed Jr. Fund | 1998

An Oklahoma City native, Bert Reed Jr. was an attorney and businessman. He created an advised fund in 1998 and further funded it through a bequest in his estate in 2008.

A. Tom F. & Gladys Seale Fund | 1986

Prior to Tom's death in 1989, Tom and Gladys Seale established an advised fund to support several youth-serving organizations. Mrs. Seale died in 2006 and a bequest in their estate ensures the fund will continue to support these organizations and St. Anthony Hospital's cardiac care unit.



Willie Elizabeth Shipley Scholarship Fund | 1981

Miss Shipley was a longtime employee of the Oklahoma State Senate. The fund was established through a bequest in Miss Shipley's will to provide scholarships for students who reside in western Oklahoma. Awards from the fund are made through the Oklahoma Youth With Promise program that benefits students graduating from high school while in Oklahoma's foster care system.

Scott & Geneva Smith Fund | 2000

As graduates of Central High School, Scott and Geneva Smith learned about the Oklahoma City Community Foundation through the Central High School Alumni Association Scholarship Fund. Their advised fund supports charitable causes important to the family.

Southwest Homebuilders Association Fund | 1999

The fund benefits charitable organizations in south Oklahoma City and the Wendell Steward Scholarship Fund, an endowment the group established in honor of an association member.

Olive May Steward Fund for Human Services | 1994

The fund was established through a bequest from Miss Steward's estate to serve the basic welfare and health needs of Oklahoma City residents.

Walter Stiller Fund | 2002

The fund was established through a bequest from Mr. Stiller to support the Fund for Oklahoma City. An Oklahoma City native, Mr. Stiller retired as treasurer of Macklanburg-Duncan and lived to the age of 99.

Tom A. Thomas Jr. Fund | 1979

A collector of World War II aircraft, Mr. Thomas was also the co-owner of Thomas Concrete in Oklahoma City. Gifts from trusts established in his estate benefit more than 40 charitable organizations.



Thomas Utterback Fund | 1999

Established through a bequest in Mr. Utterback's will, the fund supports projects in south Oklahoma City and scholarships. Mr. Utterback was a longtime banker in Oklahoma City.

Pendleton & Robin Woods | 1996

For more than 20 years, Pendleton and Robin Woods supported a number of charitable organization endowment funds at the Oklahoma City Community Foundation including Oklahoma Christian University, Epilepsy Association of Oklahoma and Boy Scouts of America. A World War II prisoner of war, Pen also established the Freedoms Foundation at Valley Forge Medal of Honor Maintenance fund to assist with the care of Oklahoma's Medal of Honor grove in Valley Forge, Pennsylvania.



R.A. Young Foundation Fund | 2007

Mr. Young was one of the founders of TG&Y, an Oklahoma-based retail chain that had more than 920 U.S. locations when it was sold in the 1960s. Through a bequest in his estate, a portion of his private foundation was transferred to the Oklahoma City Community Foundation and supports annual grants to charitable organizations including the public library in Kingfisher.

A Family Legacy Blooms


Growing up in Muskogee, Oklahoma, Miriam Freedman remembers taking walks with her mother, Roberta Kirschner, through historic Honor Heights Park. The 132-acre public park was built on Agency Hill in northwest Muskogee in 1909. Famous for its spring azaleas, today the park is a top tourist attraction for the city and is home to an arboretum, hiking trails and a number of floral gardens.

Miriam's family has long supported Honor Heights Park, as well as the Muskogee community. Her stepfather, Phil Kirschner, was a successful oil man, and he and Roberta generously contributed to a number of charitable causes. Following Phil's death in 1981, five charitable trusts were established to continue his philanthropic endeavors. Miriam began assisting her mother with administering the trusts, and she continued to carry out her family's charitable goals after Roberta's death in 1985.

Miriam administered the Kirschner Trusts for more than 30 years. When she began thinking about retirement, she wanted to find a way to lighten her workload. In 2013, she transferred the trusts to a Family Affiliated Fund at the Oklahoma City Community Foundation. She remains involved with the grant making decisions and relies on the Community Foundation's expertise to handle the legal and administrative tasks.

Miriam says it's been a great partnership. "I feel like we're working together," she said. "I'm very proud to be part of such a wonderful organization."

The Kirschner Trusts support grants to nonprofits in the Muskogee area, as well as programs for Jewish education and opportunities for foster children. The fund has supported a number of projects in Honor Heights Park including the Papilion Butterfly House and recently opened Children's Garden.



Miriam Freedman admires a butterfly in the Papilion Butterfly House at Muskogee's Honor Heights Park.

Family Affiliated Funds



Established with a minimum gift of \$1 million, a Family Affiliated Fund is an excellent alternative to a private foundation. Family Affiliated Funds provide the opportunity for a family to support charitable organizations and projects they care about without the administrative responsibilities of a private foundation. Each Family Affiliated Fund has its own trustees, operates under its own set of governing documents and is considered a supporting organization of the Oklahoma City Community Foundation. The funds are listed with the date established.

Albers Family Affiliated Fund | 2006

Both graduates of John Marshall High School, Paul and Leigh Ann Albers returned to Oklahoma City in 2007 following the sale of a business. The couple established the Albers Family Affiliated Fund to support organizations and causes important to their family. Since the fund was established, more than \$2.4 million in grants have been made to charitable organizations with a focus on those that serve children.

Bob & Nancy Anthony Family Affiliated Fund | 1999

Nancy Anthony has served as the president of the Oklahoma City Community Foundation since 1985. She and her husband, Bob, initially established an advised fund for themselves and then for each of their four daughters. In 1999, the family combined the funds to create one endowment fund. The fund supports the family's charitable interests and allows their daughters to experience charitable giving and civic responsibility firsthand.

William E. & Margaret H. Davis Family Affiliated Fund | 1987

Bill and Margaret Davis founded William E. Davis and Sons, a food distribution company, in the 1950s as a family enterprise and it remained so until it was sold in 1986. The first Affiliated Fund established at the Oklahoma City Community Foundation, the fund has distributed more than \$1.3 million in grants to charitable organizations. Mr. Davis died in July 2015 at the age of 99.

The Everett Family Affiliated Fund | 1993

In 1993, Dr. Mark Allan Everett moved his private foundation to the Oklahoma City Community Foundation to continue to support the arts, dance scholarships and music programs that he had started at several local arts organizations and universities. Although Dr. Everett died in 2006, his charitable legacy continues to support his motto of "having fun doing good."

Robert D. & Blanche H. Gordon Family Affiliated Fund | 1993

Robert and Blanche Gordon moved to Oklahoma City in 1950 with the Ashland Oil Co., where Mr. Gordon served in positions from junior geologist to vice president. In 1976, he retired and became an independent petroleum geologist. Mr. Gordon died in 2004 and Mrs. Gordon died in 2016, but their family continues to support local charities in which Bob, Blanche and their children, Holly and Peggy, have a long-term interest.

Raymond H. & Bonnie B. Hefner Family Affiliated Fund | 1998

Raymond Hefner was one of the first employees of the Kirkpatrick Oil Company. In 1957, Raymond and his wife Bonnie formed Bonray Oil Company. Mr. Hefner also served as a Trustee and Treasurer of the Oklahoma City Community Foundation. Prior to Mr. Hefner's death in 2001, the couple and their children, Vici Heitzke, Brenda Baldwin and Richard Hefner, established the fund to support their charitable interests.

John & Claudia Holliman Family Affiliated Fund | 1996

Claudia Holliman, an attorney and financial advisor, and John Holliman, Professor Emeritus of Pathology at the University of Oklahoma Health Sciences Center, view the world as their community. Through their fund, the couple recommends grants to support a wide variety of projects and programs including animal rescue organizations, educational institutions, the Oklahoma City Philharmonic, the Oklahoma City Zoological Society and other charitable and civic organizations.

Christian Keesee Charitable Trust Affiliated Fund | 2006

Philanthropy has long played a role in Christian Keesee's life. As the grandson of Oklahoma City Community Foundation founders John and Eleanor Kirkpatrick, he witnessed from an early age the impact charitable giving can have on a community. As president of the Kirkpatrick Family Fund, the largest Affiliated Fund at the Oklahoma City Community Foundation, Mr. Keesee supports areas of interest his family has supported for years. With the creation of his own Affiliated Fund, Mr. Keesee continues to support his charitable interests in the arts, animal welfare and education.



Kirschner Trusts Affiliated Fund | 2013

Created through the transfer of five trusts established by Phil and Roberta Kirschner, the fund supports Muskogee-area nonprofit organizations, Jewish education programs and opportunities for foster children. Read more about the Kirschner Trusts on Page 8.

Love Family Affiliated Fund | 1999

Tom and Judy Love leased an abandoned filling station in western Oklahoma and opened their first independent discount filling station in 1964. From these humble beginnings, Love's Travel Stops & Country Stores is now a major presence with more than 397 locations in 40 states. The Love Family Affiliated Fund was established by the couple in 1999 to support their family's charitable goals.

Malzahn Family Affiliated Fund | 1992

See story below.

Janice & Joe L. Singer Family Affiliated Fund | 2004

Joe Singer was co-founder of Singer Brothers Oil Company and served as president of the Oklahoma City Jewish Community Foundation. The couple established the Affiliated Fund to perpetuate their support of charities within the community.

Vogt Family Affiliated Fund | 2014

Justin and Marguerite Vogt had been married for 55 years when Mrs. Vogt died in 2013. Marguerite was born on a farm near Ada, Oklahoma, and played basketball for Byng High School where her coach was the legendary Bertha Teague. Mr. Vogt was born in Okarche, Oklahoma, and graduated from the University of Oklahoma in 1941. He spent his career in business and accounting. Mr. Vogt died in January 2015. Through the fund, the Vogt family continues to support Justin and Marguerite's charitable interests.

Deeply Rooted Family Helps Community Organizations Flourish

An innovative industrialist from birth, Ed Malzahn was a third-generation resident of Perry, Oklahoma.

In the 1900s, Ed's grandfather relocated his family to Perry and opened a blacksmith shop. Forty years later, Ed used a mechanical engineering degree he earned from Oklahoma State University to transform the family business into Charles Machine Works, a current industry leader in trenching equipment. Soon after, Ed made a global impact in the trenching industry by developing the world's first service line trencher, Ditch Witch.

Though Ed is known worldwide for his modernization of trenching equipment, in his hometown he is most recognized for his commitment to the Perry community.

Ed and his wife, Mary, established the Malzahn Family Affiliated Fund in 1992 to support area charitable organizations, including Perry Public Schools and the Noble County Family YMCA. After Ed's death in December 2015, a gift from his estate helped ensure the couple's support of the Perry community will continue.

"Grandpa always felt an inherent responsibility for the welfare of the Perry community and the people who helped him grow his organizations," said Ed's granddaughter, Tiffany Sewell-Howard, CEO of Charles Machine Works. "We are fortunate that his generosity will allow the Malzahn family to continue to support his philanthropic ideals."



Mary and Ed Malzahn

Sprouting Opportunities in Rural Oklahoma

A longtime resident of Coalgate, Oklahoma, Carolyn Watson was proud of her rural Oklahoma roots, but recognized the lack of opportunities presented to residents living in rural communities such as hers.

As chair and CEO of Shamrock Bancshares, Carolyn wanted to improve the quality of life for rural Oklahomans. She established the Carolyn Watson Rural Oklahoma Community Foundation to support classroom grants, community projects and scholarships in rural communities. After her death in 2014, a substantial gift from her estate expanded the programs.

One rural community that has been impacted by Carolyn's generosity is Burns Flat. Located in Washita County, the Western Technology Career Center recently opened a school-based food pantry thanks to a grant awarded to the Regional Food Bank of Oklahoma.

"Many of the students attend school during the day and work long hours at night, and they rarely have extra money for food," said Rodney Bivens, founder of the Regional Food Bank of Oklahoma. "The food pantry is helping close the food gap for these students to ensure they graduate."

Since opening in September 2016, the food pantry has served up to 100 students a month, which is more than 20 percent of the school's enrollment. But the impact is even greater, as the food provided by the pantry also benefits the students' families, reaching up to 300 individuals.

"By coming to the food pantry, I can help out my family," said an 18-year-old student. "My dad isn't working right now, and I'm helping out with food and bills and everything."

Thanks to Carolyn's generosity, her gifts will continue to sprout opportunities throughout rural Oklahoma for years to come.

A photograph of two women standing in a food pantry. The woman on the left is wearing a bright pink t-shirt and blue jeans, smiling at the camera. The woman on the right is wearing a black jacket and black pants, looking towards the camera. They are standing next to a metal shopping cart. In the background, there are metal shelves stocked with various food items, including bags of potatoes and boxes of cereal.

Shelby Luna (left), Western Technology Career Center student services specialist, helps a student select food from the new pantry.

Distribution Committee Affiliated Funds



Distribution Committee Affiliated Funds are permanent endowment funds that have fund balances greater than \$1 million and operate under a specific set of organizing documents and structure. A majority of the trustees of each fund are appointed by the Oklahoma City Community Foundation. The funds are listed with the date established.

Hospice Foundation of Oklahoma | 1998

The endowment fund was established using the assets from the sale of a hospice operation. The Hospice Foundation of Oklahoma fund supports efforts to educate Oklahomans about palliative patient care. The fund also supports the Khadar K. Hussein Awards in Palliative Care for graduating medical and nursing students.

Lawton Community Foundation | 1999

The Lawton Community Foundation is an affiliate organization of the Oklahoma City Community Foundation. It serves the charitable needs of the Lawton area through grants for community projects, scholarships, an advised fund program and an endowment program for local charitable organizations. For more information, please visit www.LawtonCF.org.

Oklahoma City Retailers Foundation Fund | 1999

The endowment fund was established by the Oklahoma City Retailers Association to benefit charitable organizations and projects in the community.

Carolyn Watson Rural Oklahoma Community Foundation | 1995

Founded by the late Carolyn Watson, longtime CEO and chair of Shamrock Bancshares, the endowment fund initially targeted community and classroom enhancement grants to the seven rural communities where Shamrock Bank operated branch locations. In 2010, Carolyn also established a scholarship endowment fund to provide awards to graduating high school seniors attending school in one of 62 rural Oklahoma counties. After Carolyn's death in 2014, a substantial gift from her estate increased the endowments, and trustees expanded the number of rural communities eligible to receive grants. For more information, see page 11 or visit www.RuralOklahoma.org.

Budding Careers Offer Complete Comfort

When Hospice of Oklahoma County merged with a local hospital in 1997, the resulting proceeds were used to establish the Hospice Foundation of Oklahoma Affiliated Fund at the Oklahoma City Community Foundation. The fund supports education about palliative and hospice care, as well as other programs aligning with the foundation's mission.

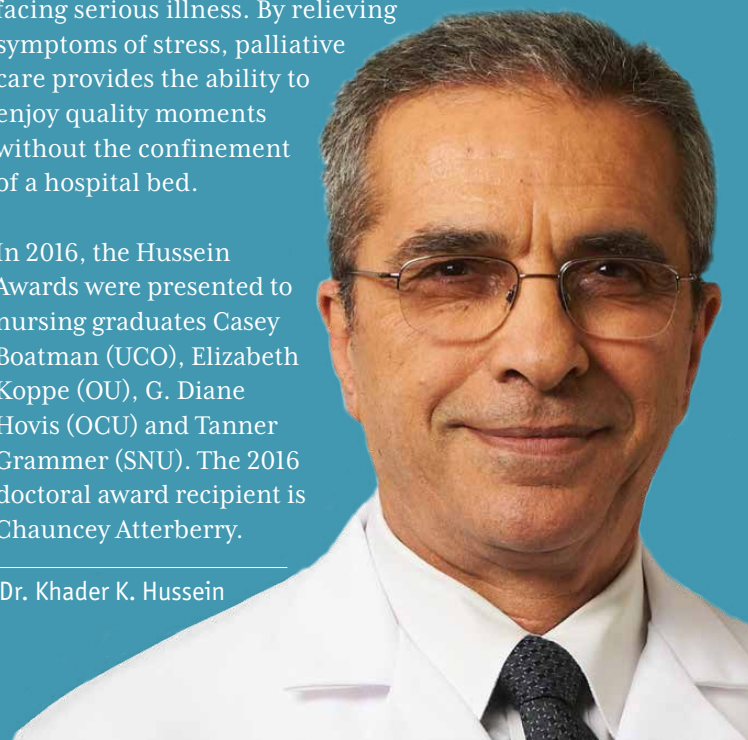
The Khadar K. Hussein Awards in Palliative Care, a program supported by the Hospice Foundation, recognizes students who have an interest in palliative and hospice care. Each year, a \$2,000 award is presented to four graduating nursing students, one each from the University of Oklahoma (OU), University of Central Oklahoma (UCO), Oklahoma City University (OCU) and Southern Nazarene University (SNU), and to one graduating medical student from the University of Oklahoma's College of Medicine.

The award honors Dr. Hussein, a former board member of the Hospice Foundation who has mentored countless medical and nursing students. He and his wife, Cecelia, have supported the awards, and Mrs. Hussein serves as a trustee of the Hospice Foundation of Oklahoma Affiliated Fund.

Palliative and hospice care offers comfort to patients facing serious illness. By relieving symptoms of stress, palliative care provides the ability to enjoy quality moments without the confinement of a hospital bed.

In 2016, the Hussein Awards were presented to nursing graduates Casey Boatman (UCO), Elizabeth Koppe (OU), G. Diane Hovis (OCU) and Tanner Grammer (SNU). The 2016 doctoral award recipient is Chauncey Atterberry.

Dr. Khader K. Hussein



Benefactors



Donors listed as Benefactors have made cumulative gifts of \$10,000 or more to permanent endowment funds or have fund balances of \$10,000 or more. Find a complete list of donors at occf.org/donorlist.

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Cultivating Educational Opportunities for Students

Janice Haunschild first began helping foster children while volunteering for Oklahoma County Child Welfare Services. Since 1986, the volunteer program has been providing resources such as school supplies, clothing, Christmas gifts and even mentoring services for children in foster care. Janice was one of many volunteers who became particularly interested in helping youth who were aging out of the foster care system.

“We realized that when a child in foster care turns 18, they are often on their own with no guidance or assistance for college,” Janice said. “We became a conduit for students aging out of the system to help provide them with opportunities to succeed.”

The group joined forces with Oklahoma City real estate developer Richard Coyle and his family, who had established the Plaza Foundation Scholarship for students in foster care. In 1996, the Coyle family transferred the scholarship to the Oklahoma City Community Foundation, and Janice and a number of supporters continued to serve on the scholarship committee, as well as make annual gifts to the fund.

“Families donated to the scholarship a little at a time, and it grew into what it is today,” Janice said.

Today, the scholarship program known as Oklahoma Youth With Promise has awarded more than \$890,000 to 685 students who graduated high school while in Oklahoma’s Foster care system. Recipient Garret Chambless says the impact of the scholarship was much greater than just financial support.

“The Oklahoma Youth With Promise scholarship helped me by providing a sense of support that I needed to help push me through college,” Garret said.

Garret will graduate in May 2017 from Southwestern Oklahoma State University in Weatherford and plans to be an occupational therapy assistant.



Janice Haunschild and Oklahoma Youth With Promise Scholarship recipient Garret Chambless

Photo by Brandon Snider



Charitable Gifts Help Build Successful Young Men

Kenneth Minick appreciates the value of hard work and determination. In 1958, he started his business with the purchase of a single dump truck, charging \$5 to haul a load of sand. Today, Minick Materials is a leading supplier of landscape and building materials in central Oklahoma.

Kenneth and his wife, Nova, are retired from the company, but they continue to be involved in building materials of a different kind. Through their longtime support of Oklahoma Baptist Homes for Children, they are helping to build stability and character in the lives of young men living at Boys Ranch Town in Edmond.

The 145-acre working ranch provides a home for boys beginning at age 7 in a family-style living environment. The boys attend Edmond Public Schools and are responsible for caring for the animals on the ranch.

“One of our goals is to help these boys graduate high school,” said Randy Pickle, development representative at Boys Ranch Town. “But we realized that once they graduate high school, many of them need continued support to further their education.”

In 2011, Boys Ranch Town opened a transitional living facility to allow residents who have graduated high school to continue living at the ranch as long as they are attending college or career technology school. Kenneth and Nova Minick make monthly gifts to provide long-term support for the transitional living program through an endowment fund at the Oklahoma City Community Foundation.

“What attracted us to the Boys Ranch Town transitional living program was seeing the end product,” Kenneth Minick said. “The program helps turn these boys into responsible, appreciative young men and offers them an opportunity to change their lives.”

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The Business of Giving Back

Piyush and Lisa Patel are in the business of changing lives. It began with their own life-changing adventure through a pen pal project in the eighth grade. Piyush, a student in El Reno, Oklahoma, began corresponding with a girl in Nebraska named Lisa.

“When I read her first letter, I knew she was going to be my wife,” Piyush said.

Seven years later, while Piyush was attending Oklahoma State University, Lisa moved to Oklahoma to join him.

“A college professor helped Lisa attend OSU on a scholarship, and that really made a difference in our lives,” Piyush said. “We just want to step up like that and help others.”

After graduating from OSU, the couple married and Piyush began teaching multimedia and digital communications at Northern Oklahoma College in Tonkawa. Frustrated with outdated training material, he began recording video tutorials for his students. In 2000, with encouragement from a student, he posted the videos online and his company Digital Tutors was born. Demand for his videos exploded and Digital Tutors became the world’s largest digital training library used by global companies including Pixar, NASA, Microsoft and Dreamworks.

In 2014, Piyush and Lisa sold the company and started Canyon Lakes Winery in Napa, California. They donate all of the profits from their wine sales to Oklahoma charities.

“Our goal is to help change lives through the products we create,” Piyush said.

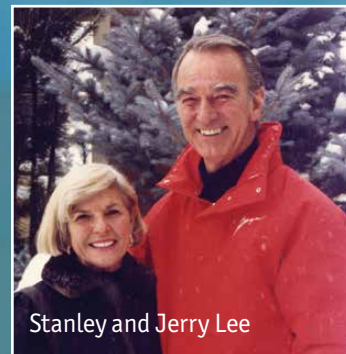
In 2015, we helped them set up an advised fund at the Oklahoma City Community Foundation, supporting a new outdoor learning center at the OSU Child Development Lab and changing the lives of countless Oklahoma children.

Piyush and Lisa Patel

Photo by Brandon Snider

Sowing the Seeds for a Healthy Community

Homegrown sweethearts Stanley and Jerry Lee first met while attending Classen High School in Oklahoma City. After college, their relationship blossomed into a marriage that would grow for 63 years. Stanley, a World War II veteran, found employment with his father's bus line, Lee Way Motor Freight, following the war. The company was sold in 1984, prompting Stanley to begin his own investment company.



Stanley and Jerry Lee

Over the years, Stanley helped cultivate the culture of philanthropy in our community by serving in leadership roles for many area

charitable organizations, including a five-year term as president of the board for the YMCA of Greater Oklahoma City.

In 1980, Stanley and Jerry established an advised fund at the Oklahoma City Community Foundation to support causes important to them. The couple also established a private foundation, which their family continued to administer after their deaths. In 2016, the family transferred the private foundation to the Oklahoma City Community Foundation to carry on the family's philanthropic legacy while eliminating the administrative burden.

Earlier this year, the Fund for Oklahoma City, a beneficiary of the Stanley and Jerry Lee Fund, awarded a \$28,500 grant to the very organization Stanley formerly served as president, the YMCA of Greater Oklahoma City. The grant supports the OK 5210 initiative, which promotes healthy eating, active living and the prevention of obesity. The OK 5210 message encourages individuals to adopt healthy behaviors by including five or more fruits and vegetables, two hours or less of screen time, one hour or more of physical activity and zero sugary beverages into their regimen each day.

"With this funding, the YMCA of Greater Oklahoma City has been able to bridge the gap in OK 5210 from message to action," said Angela Jones, executive director of YMCA Healthy Living Center. "We have witnessed so many inspirational stories from individuals and families who have incorporated these positive, realistic and easy behaviors into where they live, work, learn and play."

Thanks to Stanley and Jerry Lee's legacy of charitable giving, the Oklahoma City Community Foundation can help plant the seeds for healthy lifestyles in our youth, reaping a happier, healthier community.



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Susan H. & Kenneth R. Wiley
Sherril & Viola J. Williams
Florence Ogden Wilson
Brig. Gen. William Rex Wilson
Brett & Kelly Wimberley
Gustave R. Woerz Trust
Dorothea Wolfe
Roy G. & Alta Woods Memorial Fund
Electra Marie Woody
Betty Wooldridge*
Paul S. & Conna D. Woolsey*
Tom & Jane Ann Workman
Allen & Jacque Wright*
Muriel H. Wright Heritage
D. & C. Wygant
Hosie C. Wynne

Y

M. Blake Yaffe
Bill & Joan Yinger
Carol Elizabeth Young

Z

Don T. & Carolyn T. Zachritz*
Rob Zaslaw Memorial Fund
Edward M. Zimmerman*
Dr. Nazih Zuhdi



A Generous Gift Helps Conserve Oklahoma's Native Landscapes

Cristina McQuistion has long been involved in issues of sustainability, and became familiar with the work of the Nature Conservancy of Oklahoma in her position as vice president and chief information officer at OGE Energy Corp. Through a collaborative partnership, the organizations are working together to protect the state's natural environment while meeting the nation's energy demands.

"I had the opportunity for an extended visit to the Tallgrass Prairie Preserve in northeast Oklahoma and was inspired by the work of the Nature Conservancy," Cristina said. "Since 1986, the organization has worked to conserve Oklahoma's magnificent landscapes and unique biodiversity."

In 2010, Cristina was asked to serve as OGE Energy's representative on the board of the Nature Conservancy of Oklahoma.

"It's been rewarding to participate on the Nature Conservancy board and work together toward a more sustainable future," Cristina said.

In 2015, the Kirkpatrick Family Fund announced a \$500,000 matching grant to an endowment fund for the Nature Conservancy to support the conservation of wildlife habitat at the J.T. Nickel Family Nature and Wildlife Preserve near Tahlequah, Oklahoma. Cristina and her husband, George, were excited to lend their support with a personal contribution for the matching grant.

Administered by the Oklahoma City Community Foundation, the charitable organization endowment will provide annual funding to help maintain the Nickel Preserve for years to come.

"Fully endowing the preserve will ensure that future generations of Oklahomans will continue to benefit from the science, stewardship and conservation of the 17,000 acres of native habitat along the Illinois River," said Mike Fuhr, state director for the Nature Conservancy of Oklahoma.

To make a gift toward the match for the Nature Conservancy or to find other charitable organizations currently participating in a Kirkpatrick Family Fund match, visit occf.org/kffmatch.

Cristina McQuistion

Photo by Brandon Snider

Major Donors



Major donors have made cumulative gifts of \$1,000-\$9,999 to permanent endowment funds and made a gift during the fiscal year that ended June 30, 2016. Find a complete list of donors at occf.org/donorlist.

Ad Astra Foundation	Mitchell & Kendra Gammons	Samantha Marley-Harrod
Link & Linda Alley	Gena Gardiner	Jane Elizabeth Massey
Alpha Kappa Alpha Sorority	Kent Gardner	Patrice Mathews & Mark Wunsch
American Plant Products & Services	Gerald Garrett	Terry Maxon
Elizabeth Anthony	Joan Gilmore	Anita R. & J. Thomas May Family
Carlos Araoz, MD in memory of Eulalia Steedman Araoz	Mary Gilmore Caffrey	John & Penny McCaleb
Arvest Bank	Steven & Rhonda Godwin	Christina McQuistion
Association of the United States Navy	Kevin Gordon & Janice Mathews-Gordon	R.M. McVay
Paula Evans Baker	Grand Junction Menwear	Albert & Deborah McWhorter
Troy & Diane M. Baker	Jim & Laurie Green	William & Jacqueline Medley
Bank of Oklahoma Foundation	Andrew & Judi Gregory Family Foundation	Metro Fire Chiefs Association
William & Sherry Beasley	Todd & Leslie Griffith	Pat Meyer
Clarence & Marsha Beatty	Halliburton	Morris Miceli
Margaret V. & Ray E. Bishop	Mark Hanstein	Kim & Bill Michaels
Bob & Debbie Blackburn	Mr. & Mrs. Thomas K. Harrah	Vicki Miles-LaGrange
Lisa Blackburn	James & Jean Ann Hartsuck	Byron Millsap
Harold & Carole Bourlon	Don W. & Mary Ann Haskins	Chris & Laura Mitchel
Joe & Lori Carter	Rick Hauschild	Moesel Family Fund
Joanna M. Champlin & Shawnee Brittan	Don Hawkins	R. Clark & Kay Musser
Agatha Lee & Tommie L. Clark Jr.	Jerry Henry	Naval Enlisted Reserve Association
Benton Clark	Frank D. & Bette Jo Hill	Oklahoma Chapter
Donald M. & Yvonne Clark	Steve Holton	Nichols Energy Services
Sam & Rita Combs	Mr. & Mrs. Larry M. Hooper	Larry & Polly Nichols
Kenneth R. & Manda S. Conklin	K.R. & Lois Hornbrook	George & Donna Nigh
ConocoPhillips	Dow & Deanne Hughes	Alberta Wilhelmina "Bobby" Peters Ogden Fund
Laura J. Cooke	Dr. Wayne P. Hunt	Oklahoma City Firefighters Association
Teresa Cooper	Charles Johnson	Oklahoma State Firefighters Women's Auxiliary
David & Jennifer Cottle	Larry & Brenda Johnson	OKC Kayak
Credit Jewelry	Peggy Kates	Van Oliver
William & Millie Cress	Ronald "Skip" & Patricia Kelly	Clarence & Polly Paine
Winifred A. Crim	Tim & Phyllis Kersey	Jane Park
Bob Curtis	Owen Lafferty	T. Ray & Brooke Phillips Family
CVI Solutions	Drs. Scott Lamascus & Alice Mankin	Randy & Peggy Pickle
Charles & Julie Daniels	Daniel Lawrence	Ronald & Sarah Pool
Nancy L. Dawson	Theresa Lee	Mark & Janet Price
Rowland & Mary Denman	Jean Lehr	David & Kim Rainbolt
Brett & Tracy Dick	Hilda Lewis	Stephen & Megan Rector
Mark & Kaye Dick	LaCrecia Lewis	Barry & Melanie Redlinger
Brian & Marileigh A. Dougherty	Bill & Kay Lindsey	John & Sharon Reeves
Darrell Duer	John & Caroline Linehan	Marvin & Linda Resnick
Amy Edwards	Cathy S. Lippard	Carol Ricks
Gerald Emmerich	Logan Ranch	Patrick T. Rooney
Bryce & Sherri Fair	J.P. London	Carol Thompson-Rountree
Donald F. & Sally M. Ferrell	Eric & Amy Loper	Grace Ruidera
Suzanne Fiaccone	James B. Lowe III	Rulewicz Foundation
First Bethany Bank & Trust	Steve & Cheryl Lumry	Mary Jane Rutherford
Vernon E. & Betty J. Forshee	Peggy A. Lunde	S & K Acquisitions
Bruce & Cara Fraley	Jeff & Cathy Lyttle	
	David & Jayne Marley	

Nurturing Future Leaders Through Scholarship Gifts

Charles and Mary Lou Miles instilled the value and importance of education within their daughter at an early age. Vicki Miles-LaGrange, U.S. District Judge in the Western District of Oklahoma, says that going to college was nonnegotiable with her parents.

“My dad always said education was a way up and a way out,” Vicki said.

Vicki graduated from Vassar College and Howard University School of Law before embarking on a career that would blaze a trail for black women in the field of law. In 1986, she was the first black woman elected to the Oklahoma Senate. She went on to achieve a number of “firsts” including becoming the first woman, as well as the first black woman, to be appointed as U.S. Attorney for the Western District of Oklahoma.

Though she is well accomplished, Vicki says she is first and foremost a public servant. “The chance to serve others has been the opportunity of a lifetime,” she said.

Vicki and her family also believe in the importance of giving back, and together they established a scholarship fund at the Oklahoma City Community Foundation in honor of her parents. Through her ongoing support of scholarships, Vicki is continuing her family’s legacy of growing future leaders.

“By giving back to others and providing young people with educational opportunities, we can help ensure a brighter future,” Vicki said.



Vicki Miles-LaGrange



“I am grateful for the opportunities this award will provide me. As I move through my course work on my way to an elementary education degree, I will always be mindful that my trek and journey have been greatly assisted by your generosity.”

Kaylyn J. Brown
2015 Charles C. and Mary Lou Miles
Scholarship Recipient

Scapes, Inc.
J.B. Schuelein
Kendra Scott Design, Inc
C. Carson & Marsha See/Sees Design
Charles & Linda Shackelford
Linda Simonton
Sneed Foundation
Southeastern Energy Co.
Edwin J. Stahl Jr.
Stephens-Zeiler Family
Kathleen & Tom Stevenson
Jennifer & Dale Stewart
John Stott
Daniel R. & Phyllis J. Stough

Lenny D. Stubbs
Jerry & Sharon Sublette
Andy & Sue Moss Sullivan
Shawn Svob & Erin Roberts-Svob
Mark & Julie Svoboda
Betty O. Talbot
Dan & Susan Taylor
Paul T. Theisen
Ralph & Barbara Thompson
Robert & Jackie Tilghman
Valliance Bank
Donna Kennedy Vogel
Jim & Cathy Waldo
Misty L. Wayman

Todd Wedel
Brent White
Charles E. & Renate W. Wiggin
Jerry & Eleanor Wilkes
Dale & Frances Willhite
Anne Wileman Workman

In Memoriam



With deep appreciation for their lasting contributions to the community, we remember the following individuals.

Joseph (Joe) Andrash (1930-2015)

Oklahoma City architect Joe T. Andrash graduated with a bachelor's degree in architecture from the University of Oklahoma in 1956. His comprehensive professional experience in architecture was useful in the construction of many multi-million dollar buildings in Oklahoma including The Myriad and Citizens Tower in Oklahoma City. Joe was an accomplished volunteer in many organizations in central Oklahoma. He served as chairman of the Oklahoma City Arts Festival production committee from 1966 to 1973. He was a board member for Oklahoma City Beautiful through which he revived worthwhile projects benefiting Oklahoma City's parks and trees. In addition, he made contributions to benefit the Oklahoma City Beautiful Wildflower Fund in memory of his mother, Anna Andrash. After his death, a gift from his trust created the Joseph T. Andrash Beautification Fund to support beautification efforts in Oklahoma City.



Michael Barlow (1944-2015)

Born in 1944 in New York City, Michael Barlow arrived in Oklahoma after enrolling for college at the University of Oklahoma and never left. A teacher at U.S. Grant High School in Oklahoma City, Michael was inducted into the Oklahoma Educator's Hall of Fame in 2010. Michael was a passionate supporter of the State of Israel and a voice for the Oklahoma City Jewish Community. He and his wife, Anita, supported endowment funds at the Oklahoma City Community Foundation benefiting Emanuel Synagogue and the Hillel Foundation for Jewish Life at the University of Oklahoma.



William Bross (1929-2015)

William "Bill" Bross was born in McAlester, Oklahoma, and later relocated to Norman to attend the University of Oklahoma. Following his graduation, he served in the military for two years during the Korean Conflict before earning his master's degree in social work and community planning from Ohio State University. He held many positions with the United Way in multiple states before finally returning to Oklahoma City with his wife, Shirley, in 1968. Here, he served as the executive director of the Community Council of Central Oklahoma until his retirement in 1991. Bill organized many social services programs for underserved and indigent populations of Oklahoma City. He volunteered his time to assist the Oklahoma City Disaster Relief Fund at the Oklahoma City Community Foundation that helps with medical and mental health needs of those directly impacted by the 1995 bombing of the Alfred P. Murrah Federal Building.

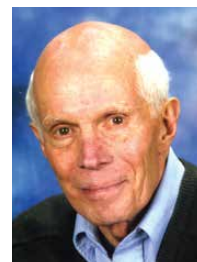
Mary Clements (1927-2016)

Born in 1927, Mary Elizabeth Clements was a proud member of the Choctaw Nation and a graduate of Tulsa Central High School and the University of Oklahoma. Mary was a general partner of the Johnson Land and Cattle Company, which had its origins with her grandfather and great-grandfather, and she enjoyed traveling to the Johnson Ranch in Alanreed, Texas. Mary and her husband, Dick, were devoted supporters of the Classen Awards Foundation that provides scholarships for graduating seniors at Northwest Classen High School.



Richard Coyle (1932-2015)

Born in Oklahoma City in 1932, Richard "Dick" Coyle graduated from Classen High School and the University of Oklahoma. He served for three years in the U.S. Air Force, two with combat control teams, before spending a short time in the oil business and eventually going on to join the family's real estate business. Dick was active in his church life as well as civic and professional affairs, and he was instrumental in establishing the Oklahoma Youth with Promise Scholarship fund at the Oklahoma City Community Foundation in 1996. The scholarship awards benefit Oklahoma's youth in the foster care system.



William E. Davis (1916-2015)

Nebraska native William Edgar "Bill" Davis came to Oklahoma City with his wife, Margaret, to begin Davis Wholesale Grocery in 1953 following his retirement as a lieutenant colonel from the U.S. Army Reserve. In 1986, Bill sold the store to the national chain, US Foods, where he remained employed for another 14 years. Bill was an avid Oklahoma Sooner fan and had a knack for comedy. In 1987, he and Margaret established the William E. and Margaret H. Davis Family Affiliated Fund and the family has given more than \$1.5 million in grants to charitable organizations through the fund.



In Memoriam

Dortha Dever (1936-2015)

Dortha was born in 1936 in Aubrey, Texas, and graduated from Caney High School in Caney, Oklahoma. She earned a business degree from Oklahoma City University (OCU) that ignited her career in the financial services industry and fueled her desire to support young, business-minded women pursuing degrees at OCU. Dortha held many positions in financial services but retired as the assistant vice president of American Fidelity Group after 32 years of employment with the company. In 2007, she established the Dortha Dever Business Scholarship, and following her death in 2015, a gift from her trust increased the annual awards to provide four OCU students each with a \$5,000 scholarship.



Elliott Fenton (1914-2015)

Born in 1914 in Oklahoma City, Elliott Fenton received a law degree from the University of Oklahoma in 1937. The World War II veteran participated in six invasion campaigns with the U.S. Navy, receiving the Bronze Star Medal for his combat service before retiring from the U.S. Navy Reserve with the rank of commander. Following the war, Elliott practiced law with his father for more than 30 years at Fenton, Fenton, Smith, Reneau and Moon. A member of the Wesley United Methodist Church, his passion for the Methodist movement led him to establish a scholarship fund to provide music scholarships for Oklahoma City University students who sing in the Wesley United Methodist Church choir.



Millard L. Gardner (1927-2015)

Born in Pawnee, Oklahoma, in 1927, Millard L. "Dan" Gardner and his wife, Helen, were both graduates of Central High School in Oklahoma City. The couple relocated to Oregon in 1960 where Dan worked in newspaper production for The Oregonian until his retirement in 1986. In 2007, Dan established the Helen P. Oldham Gardner Memorial Scholarship fund in memory of his wife to support Central High School Alumni Association scholarships for students awarded through the Community Foundation Scholars program.

Blanche Gordon (1922-2016)

Blanche Hoyt Gordon was born in 1922 in Winnetka, Illinois, and graduated from Pine Manor Junior College in Michigan. She married Robert D. Gordon Jr. in 1946, and the two found a home in Oklahoma City in 1950 when Robert became employed with the Ashland Oil Co. Blanche was an active supporter of several charitable organizations throughout central Oklahoma, many of which her family continues to support through the Robert D. and Blanche H. Gordon Family Affiliated Fund.

Mary Lu Gordon (1935-2016)

Mary Lu Tracewell Gordon was born in Kansas City, Missouri, in 1935. Mary Lu earned both bachelor's and master's degrees from the University of Oklahoma. She went on to teach political science at Oklahoma City University while she was attending OCU law school. She served as the assistant municipal counselor for Oklahoma City and was in private practice with her husband, Dell. She also served as the judicial law clerk to Judges Lee West and David Russell, allowing her the opportunity to research and write about complex legal issues. Mary's legal expertise was crucial to the formation of Oklahoma City's MAPS and MAPS for Kids programs. She was the strong and committed leader of a close and loving family. Following her death, her family established a memorial fund at the Oklahoma City Community Foundation.

James Hyde (1945-2015)

James Allen Hyde was born in Oklahoma City in 1945. After graduating from the University of Oklahoma with a degree in accounting, he went on to earn his law degree at Oklahoma City University and begin a career as an accountant at Kerr-McGee. He later served as the controller and then president of McBride Bone and Joint Hospital. A board member at St. Anthony Hospital, Jim served as a trustee of the Hospice Foundation Affiliated Fund at the Oklahoma City Community Foundation that supports palliative patient care education.



Bill Larson (1920-2016)

A lifelong Oklahoman, Bill Larson was born in Bartlesville in 1920 and grew up in Oklahoma City, graduating from Classen High School. He received both his bachelor's and law degrees from the University of Oklahoma. The World War II veteran flew 111 combat missions during the Korean Conflict. He practiced law for nine years before joining his father's manufacturing company for oil field equipment, Larson Supply, where he remained until his retirement in 1982. Bill and his late wife, Pat, founded the Free to Live animal sanctuary in Edmond, Oklahoma, and in 1992, they helped establish an endowment fund at the Oklahoma City Community Foundation that provides ongoing support for the organization.

Sammy Lovelace (1945-2016)

Born in 1945, Sammy Lovelace graduated from Oklahoma City's Central High School in 1963. Sammy was a passionate supporter of the Central High School Alumni Association, serving as president and helping establish the group's scholarship fund at the Oklahoma City Community Foundation. Sammy's greatest loves were his family, his pets and his friends.





Abbott (Betty) Mahone (1922-2016)

Abbott (Betty) Mahone was born in Durant, Oklahoma, in 1922 and graduated from the University of Oklahoma in 1944, where she served as president of the Delta Delta Delta Sorority. In 1947 she met her husband, Dr. M. Wilson Mahone, and soon after followed him to Hobart, Oklahoma, where he established a medical practice. In 1973, Betty and Wilson returned to Oklahoma City to allow Wilson to complete an anesthesia residency. Betty was very active in both the Hobart and the Oklahoma City communities, and her legacy will live on through the Mahone Family Foundation Fund that was established at the Oklahoma City Community Foundation in 1999. In addition, Betty, Wilson and their children established the Mildred and William Young Scholarship in honor of their family friends to benefit graduating seniors from Hobart High School.

Ed Malzahn (1921-2015)

An innovative Oklahoman who developed the world's first service line trencher known as the Ditch Witch, Gus Edwin George "Ed" Malzahn grew up in Perry, Oklahoma, and graduated with a degree in mechanical engineering from Oklahoma State University. Ed met his wife, Mary, at OSU and the two wed in 1943. Ed began The Charles Machine Works, Inc. as an offshoot of his father's blacksmith and oil field support business. Today, the company is an industry leader for trenching equipment. In 1992, Ed and Mary established the Malzahn Family Affiliated Fund that has distributed more than \$830,000 in grants to support the Perry community.



Aubrey McClendon (1959-2016)

Aubrey K. McClendon was born in Oklahoma City in 1959 and was a graduate of Heritage Hall High School. He attended Duke University where he met his wife, Katie. The two made a life in Oklahoma City, and Aubrey got his start in the oil and gas business working for his uncle, Aubrey Kerr. Aubrey eventually went on to co-found his company, Chesapeake Energy Corporation and grew it to be the most active driller and the second largest producer of natural gas in the United States. He helped launch the "shale business" that today dominates activity in the U.S. oil and gas industry. Aubrey helped shape Oklahoma City into what it is today and had multiple civic and philanthropic passions for the community. A memorial fund established at the Oklahoma City Community Foundation in his honor supports the Boys & Girls Clubs of Oklahoma County.



Mary Odom (1949-2015)

A Chicago native, Mary Elizabeth Odom graduated from the Miami Valley School of Nursing in Ohio and worked at the Children's Medical Center in Dayton. In 1975, she met her husband, Paul Odom Jr., who was piloting the aircraft transporting one of her patients to Shriners Hospital in Houston. Soon after, Mary and Paul wed, and she moved to Oklahoma City where she worked at Children's Medical Center for many years. Paul served as a Trustee of the Oklahoma City Community Foundation for nine years, and the couple established the Mary E. and Paul B. Odom Jr. Fund to support a number of charitable organizations including Catholic Charities and the Oklahoma Zoological Society.



ReJeania Steiner (1947-2015)

Born in Fort Smith, Arkansas, in 1947, ReJeania Ann Steiner loved children and devoted her life to them. For over 25 years, ReJeania served as head of the primary division at Westminster School in Oklahoma City. Her enthusiasm, optimism and deep understanding of Montessori teachings were rare, and the kind manner in which she practiced her craft impacted thousands of children and their families. ReJeania and her husband, Tom, were active philanthropists in our community, and ReJeania's legacy will live on through the ReJeania Steiner Memorial Fund established at the Oklahoma City Community Foundation by her family.



Yvonne Chouteau (1929-2015)

Born in 1929 in Fort Worth, Texas, Myra Yvonne Chouteau was a highly-esteemed ballerina of Cherokee heritage. A member of the oldest pioneering family in Oklahoma, she was the great-great-great-granddaughter of Maj. Jean Pierre Chouteau who established Oklahoma's oldest white settlement at the present site of Salina, Oklahoma. Yvonne was a beloved teacher and mentor to generations of dance students, and with the help of her husband and fellow dancer Miguel R. Terekhov, the couple founded the first fully-accredited and top-ranked dance departments in the United States at the University of Oklahoma. Yvonne and Miguel also played an essential role in the beginnings of the Oklahoma City Ballet. In 1976, Oklahoma City donors Mr. and Mrs. Bryan Arnn established the Yvonne Chouteau Fund in her honor to support the Oklahoma City Ballet.



Advised Funds Produce Enduring Support for Area Organizations

John and Susan Frank's commitment to philanthropy in our community has benefited the lives of many. To the Franks, philanthropy is a way of life and a civic responsibility to which they feel called to fulfill.

The couple is actively enjoying their retired years committed to volunteer work for many youth and education programs throughout Oklahoma City. Susan volunteers with Oklahoma Cleats for Kids and El Sistema Oklahoma and John with CASA of Oklahoma County, three organizations that benefit underserved youth in Oklahoma City. John also organizes a volunteer program to mentor and tutor students in the Oklahoma City Public School district, specifically at Rancho Village Elementary in south Oklahoma City.

Philanthropy is nothing new to the Franks as they have been supporting area charities for many years. In 1993, the Franks established two advised funds at the Oklahoma City Community Foundation to help accomplish their charitable goals. Formerly a certified public accountant, John believes

advised funds are the "best vehicles to assure long-term support" for those nonprofits essential to the well-being of the community.

Through their advised funds, the Franks provide ongoing support to the charitable organizations of their choice while their fund continues to grow over time. The Franks have used their advised funds to support more than 50 different charitable organizations including Regional Food Bank of Oklahoma, Positive Tomorrows and Harding Charter Preparatory School.

"The Oklahoma City Community Foundation allows us to provide continued support to the programs and causes we care about most," says John. "Endowment is essential in ensuring sustainability for nonprofits."

Thanks to the Frank's advised funds, the youth and education programs they care about most will receive much needed financial support for years to come.

Advised Funds

Give Now, Choose a Charity Later

An advised fund is a simple, flexible and tax-efficient way to give back to your favorite charities. When you make a gift to an advised fund, you receive an immediate tax deduction and have the flexibility to decide which charitable causes to support at a later date.

We offer three types of advised funds with minimums ranging from \$1,000-\$20,000:

Legacy Fund

Permanent endowment fund with an annual spendable amount.
Minimum balance of \$20,000.
Invested to receive investment returns.

Gift Fund

Fund balance is completely spendable.
Minimum initial gift of \$20,000.
Invested to receive investment returns.

Express Fund

Fund balance is completely spendable.
Minimum initial gift of \$1,000.
Does not receive investment returns.

In Fiscal Year 2016:

- 25 new advised funds were established
- For a total of 536 advised funds
- From these funds, donors recommended \$18,109,550 through 2,203 grants to 952 organizations

All of our advised funds have low, competitive fees, and we provide administrative support to help make charitable giving simple. You can establish an advised fund with a gift of cash or other assets such as real estate, appreciated securities, oil and gas royalty interests or a life insurance policy.

To learn how an advised fund can help simplify your charitable giving, contact Joe Carter at j.carter@occf.org or 405/606-2914.



John and Susan Frank with students at Positive Tomorrows, an Oklahoma City elementary school for children of homeless families. The Franks have supported Positive Tomorrows through grants from their advised fund.

Photo by Brandon Snider

Growing Your Charitable Impact Through Planned Gifts



When planning for the future, we all want to ensure that our loved ones will be provided for and our financial interests protected. Once you've determined what assets you plan to leave for your heirs, have you considered how you might use your will or trust to provide lasting support to the charitable causes you care about most?

By working together with the Oklahoma City Community Foundation, you ensure that your charitable gifts will make a lasting impact. We can help you and your professional advisor develop a charitable plan that will provide tax benefits for you and your family, while also supporting your charitable interests.

An outright gift to charity will provide a one-time benefit, while a gift to a permanent endowment at the Oklahoma City Community Foundation demonstrates a long-term commitment. Our charitable funds are permanent and invested to allow for growth over time, therefore supporting your charitable interests forever.

By designating a gift through your will or trust, you can maintain your current cash flow and preserve your assets for retirement.

Tired of paying taxes on your IRA distributions?

The IRA Charitable Rollover is now permanent! If you are age 70 ½ or older, you can make a tax-free gift up to \$100,000 per year from your IRA to the Oklahoma City Community Foundation to support or create a new endowment fund for a scholarship or a charitable organization. These IRA rollover gifts can be used to meet your required minimum distribution, saving you money on income taxes and potential penalties.

Contact us to learn more about the following giving options:

- Real estate including homes, acreages or business properties
- Appreciated securities such as common or closely-held stock, bonds and mutual funds
- Oil and gas royalty interests
- Life insurance policies
- Retirement plans

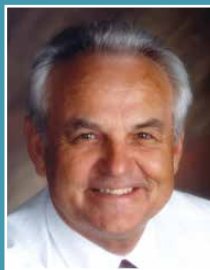


Joe Carter

To learn how we can help you grow your charitable impact, contact Joe Carter at 405/606-2914.

Reap Multiple Benefits with Tax-wise Giving Options

Financial advisor George Ashford has been helping his clients plan for the future for more than 50 years. An associate at the Landmark Financial Group in Edmond, George works together with the Oklahoma City Community Foundation to structure charitable giving plans for his clients that also provide a variety of tax benefits.



George Ashford

For clients Charles and Ann Dungan, the partnership was a natural fit. Residents of Chickasha, Oklahoma, the Dungans had received income from oil and gas assets creating unexpected tax liabilities. In 2005, George referred them to the Oklahoma City Community Foundation to make a charitable gift to help offset their income taxes.

"God really blessed us and we had a really good year," Ann said. "We wanted to find a way to give back and share our blessings with others."

A few years later, the Dungans were meeting again with Joe Carter, director of development at the Oklahoma City Community Foundation. Ann invited her sister, Zarah Virgin,

to join the meeting. After learning about an opportunity to give back while reducing their taxable income and receiving annuitized payments for life, the sisters had an idea. They decided to each establish charitable gift annuities that will ultimately create the H.F. and Mary Ellen Virgin Scholarship in memory of their parents.

Thanks to the advice of George Ashford and his partnership with the Oklahoma City Community Foundation, Ann Dungan and her sister Zarah Virgin will benefit from the tax-wise charitable gifts during their lifetimes and honor their parents' memory for years to come.

How a Charitable Gift Annuity Works

1. You make a gift of cash or other assets to Oklahoma City Community Foundation.
2. In exchange, we distribute fixed payments to you for life. The payment amount is determined by your age.
3. You will receive a charitable income tax deduction for a portion of the donated assets.
4. At the end of the term, the remaining balance supports the charitable cause of your choice.

“We wanted to find a way to give back and share our blessings with others.”

Charles and Ann Dungan

How You Benefit

- You receive an immediate charitable income tax deduction for the gift, reducing your taxable income.
- You or a loved one will receive fixed payments for life that may be partially tax-free.
- You create a legacy and support your favorite charitable causes.

To learn how you can reap the benefits of our various tax-wise giving options, contact Joe Carter at 405/606-2914.

Fostering Impact Through

A photograph of two students running on a track at Webster Middle School. The students are in motion, with a slight blur, suggesting speed. They are wearing dark athletic shirts and light-colored shorts. The track is a reddish-brown color with white lane markings. In the background, there is a large green field, a baseball field with a fence, and a cloudy sky. The overall scene is bright and active.

Students running on the Webster Middle School track in south Oklahoma City. The track was made possible through a grant from our Parks & Public Space Initiative to Fields and Futures.

Photo by Brandon Snider

Community Programs

As we invest the resources of generations of donors, the Oklahoma City Community Foundation fosters collaboration among community partners to achieve greater impact. Through our Community Program Initiatives, we provide leadership to bring together resources and strategic partners to meet the changing needs of the community.

Through our Parks & Public Space Initiative, we are working to create more usable public spaces for the community to enjoy. Spaces like the school grounds at Webster Middle School in south Oklahoma City. Just a few short years ago, uneven terrain, broken goal posts, weeds and trash greeted Webster students, as well as families from the nearby neighborhood looking for a space to play. Thanks to a collaboration of community partners, the nonprofit organization Fields & Futures renovated the area, providing students with new athletic fields and the neighborhood with a school park.

A grant from the Oklahoma City Community Foundation's Parks & Public Space Initiative added a walking/running track to the sporting complex, as well as landscaping and trees, creating a park to be enjoyed by the surrounding community for years to come.

Katrinka Greear, athletic director at Webster Middle School, says the track has been a game changer for both students and the community.

"Before, our students who participated in track would have to go off campus to practice," she said. "Now they have a real track and the program is generating a lot of interest with more students participating."

Collaborative partnerships like the Webster Middle School track project exemplify how the Oklahoma City Community Foundation is working to create effective solutions that benefit the whole community.

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Helping a Community Thrive

“The key to any community is education,” says Oklahoma City businessman Horace Stevenson. The 1957 Douglass High School graduate certainly exemplifies his words through his longtime support of educational programs in Oklahoma City Public Schools.

After graduating from Oklahoma City University with a business administration degree, Horace opened his first restaurant, Horace’s Grill, in 1968. He joined the McDonald’s management program in 1977, and 10 years later he purchased his first of many McDonald’s franchises.

As a business owner, Horace says he prioritizes giving back to the community that gave him his start. Throughout the years, he has mentored many young people, and he established the Horace Stevenson Foundation to support youth and education programs.

“I’ve always just wanted to work hard and give back to my community,” Horace said.

For several years, his private foundation awarded scholarships at high schools located in Horace’s restaurant trade areas including Douglass, Millwood, U.S. Grant, Capitol Hill, Southeast and Northeast high schools. In 2015, the Stevenson family was looking for a way to increase scholarship applicants. Upon learning of the services offered through our scholarship program, the family transferred the Horace Stevenson Scholarship to the Oklahoma City Community Foundation. Horace says the Community Foundation’s online application allows them to reach even more students, making a greater impact in the community.

“By providing scholarships for students, we hope to provide them with opportunities that have the potential to change their lives,” Horace said.

Through his family’s continued support of education, Horace is helping his community flourish in ways that can never be repaid.

Scholarship Program

The largest provider of independent scholarships in the state, the Oklahoma City Community Foundation’s scholarship program awards \$1.5 million to more than 600 students each year. Since 1970, when the first scholarship fund was established by E.K. Gaylord, the program has grown to include 200 scholarship endowment funds. These funds have been established by a variety of individuals, corporations, alumni groups and civic organizations with one goal in mind — to help students continue their education beyond high school.

Trustee Scholarship Initiative

In addition to the scholarships established by individual donors, the Oklahoma City Community Foundation Trustees established the Trustee Scholarship Initiative in 1998 to encourage more students in central Oklahoma to attend college. The Trustee Scholarship Initiative supports the following scholarship programs:

Community Foundation Scholars – awarded to students from 52 central Oklahoma high schools who are good students and active in their community, as well as students who may be the first in their families to attend college. For the 2016-17 academic year, 162 Community Foundation Scholars each received a \$2,000 award.

Oklahoma Youth With Promise Scholars – awarded to students who graduate from high school while in Oklahoma’s foster care system. For the 2016-17 academic year, 34 students received scholarships through this program. Read more about Oklahoma Youth With Promise on page 15.

Nurse Education Program – awarded to third and fourth year college students enrolled in a nursing program and practicing

Registered Nurses pursuing a nursing-related bachelor’s degree. For the 2016-17 academic year, 11 nurses were awarded scholarships.

To learn how you can support scholarships for students, contact Megan Hornbeek Allen at m.hornbeek@occf.org or 405/606-2917.



Megan Hornbeek Allen

Central Oklahoma Guidance Counselor Network

A key component of our Trustee Scholarship Initiative is the participation of high school guidance counselors in the Central Oklahoma Guidance Counselor Network. Through the network, we offer free training and support to guidance counselors at 52 central Oklahoma high schools. In addition to continuing education workshops and campus visits to help educate the counselors about college admissions and financial aid opportunities, we provide at least one Community Foundation Scholars award to each participating high school.



The Stevenson Family at Horace's alma mater, Douglass High School. From left to right, Karen Marshall, Horace Stevenson, Horace Stevenson III, Tonjua Whetstone, Ashley Stevenson, Alisha Whetstone and Horace Stevenson Jr.

Photo by Brandon Snider

Scholarship & Award Endowments

The following scholarship and award endowments were established at the Oklahoma City Community Foundation as of June 30, 2016. Students can apply for scholarships online at occf.academicworks.com. Find a complete list of scholarship endowments at occf.org/directory.

Mike Allen Memorial Education Fund
Aaron Alley Memorial Scholarship
H.W. Almen/West OKC Rotary Scholarship
American Society of Civil Engineers Scholarship
American Society of Landscape Architects Scholarship
Andersen-Spraberry Scholarships
Bank of Oklahoma Achieving New Goals Scholarship*
BSO Ivy Foundation Scholarship
John Barresi Memorial Scholarship
J. Edward Barth Community Foundation Scholar Award
Bennett Family Scholarship*
John Blaess Memorial Scholarship
Patrick S. Bonds Memorial Scholarship
Vinita F. Boyer Scholarship
Alberta Brannon Memorial Scholarship
Dr. Eugene S. Briggs Memorial Scholarship
Mike Buchwald Costume Design Scholarship
Frank & Merle Buttram String Awards
Capitol Hill High School Scholarship
Elizabeth E. Carlson Scholarship
Duane & Villa Rae Carter Scholarship
Casady Class of 1996 Scholarship
Central High School Alumni Association Scholarship
Central Oklahoma ASHRAE Scholarship
Lonnie & Nancy Childress Scholarship at Panhandle State University*
James C. Clark Community Foundation Scholar Award
Kimberly Kay Clark Memorial Scholarship-Naval Reserve Association
Classen '55 Scholars Fund
Classen Awards Foundation
Classen Class of 1945 Scholarship
Classen Class of '54 Scholarship
Classen High School Alumni Association Scholarship
Ralph Clinton Scholarship-Sales & Marketing Executives
Nancy Coats-Ashley Community Foundation Scholar Award
Commander Family Scholarship
Brad R. Corbett Memorial Academic Trust
Cox Charities Family Scholarship
Jean Hawley Curtis Scholarship
Harley Custer Memorial Scholarship
DANA Corporation Scholarship
James R. Daniel Community Foundation Scholar Award
Dortha Dever Business Scholarship
Douglass High School Class of 1967 Scholarship
Paul W. Dudman Community Foundation Scholar Award
Durant Community Scholarship
Durrell Public Law Research Award
Early Childhood Association of Oklahoma Scholarship
Everett Foundation Scholarships
Mark Allen Everett Graduate Fellowship in String Performance-University of Oklahoma School of Music
Barbara Fagin Spirit of Volunteerism Award
Brunel D. Faris Art Exploration Scholarship
Karen Sue Freeman Memorial Scholarship
Irene P. & Samuel F. Frierson Educational Trust
Fulmer Trombone Scholarship
Sybil Irene Gabbard Scholarship
Wauhillau Austin Gale Memorial Scholarship
Ema Garcia Memorial Scholarship
Garner-Stocker Foundation Scholarship
Edward King Gaylord Scholarship
Elsie Mae "Nat" Glosemeyer Scholarship
Freda Poole Grayson Scholarship
Greater Oklahoma City Alumnae Panhellenic Foundation Scholarship
John E. Green Community Foundation Scholar Award
Kirkland Hall Community Foundation Scholar Award
Harris Harding Scholarship
Mary Louise Hartpence Scholarship
James H. Holloman Jr. Community Foundation Scholar Award
Geneva Hood Award - Casady School
Jonas & Mary Beatrice House Scholarship
G. Ed. Hudgins Scholarships-OSU College of Engineering
Hudiburg Family Fund Scholarships
Geneva Johnston Hudson Scholarship
Khader K. Hussein Awards in Palliative Care
Hutchinson Scholarships
Iron Workers Local 584-Harvey A. Swift Scholarship
Virgil & Pauline Jackson Scholarship
St. James Catholic School Scholarships
-Albert & Freda Marottek Scholarship
-Lorene Sherman Memorial Scholarship
-Tracy Wilson Memorial Scholarship
Dennis James Scholarship - Deer Creek Baseball Fund
Jane Jayroe Gamble Community Foundation Scholar Award
Miles Jenkins Memorial Scholarship
Kay Jewell Scholarship
William M. & Janet S. Johnson Scholarship
Jones High School Scholarship
Friends of Kim Jones-Shelton Scholarship
Dorothy Detrick Kendall Piano Scholarship Award-University of Oklahoma School of Music
Dr. Edith King Mental Health Scholarship
Rev. Kenneth King Memorial Scholarship
Martha King Scholarship*
Kirschner Trust Scholarship
Donna Vandiver Knapp Piano & Vocal Music Education Fund

*New fund in FY2016



Valerie Koelsch Memorial Scholarship
Donna & Harry Kornbaum Scholarship
PFC Anthony Adam Landers "Zero to Hero" Scholarship
Sally Jo Clark Langston Memorial Scholarship
Wann & Clara Langston Scholarship
Learning With Love's Scholarship
Judy Love Community Foundation Scholar Award
G. Stephen Mason Scholar Award
Tommy & Jackie Maxon Scholarship
June Mitchell McCharen Scholarship
McGee Foundation Scholarship Fund
Frank A. McPherson Community Foundation Scholar Award
Benny McReynolds Memorial Scholarship
Ruth Mershon Scholarship
Harry Merson Community Foundation Scholar Award
Charles C. & Mary Lou Miles Scholarship
Michael Neal Minter Sr. Scholarship
Richard Moesel Scholarship
Dr. Gary M. Moore Dance & Arts Management Scholarship
Dr. Gary M. Moore Great Plan Scholarship
J. Larry Nichols Community Foundation Scholar Award
Ronald J. Norick Community Foundation Scholar Award
Northwest Classen High School Class of 1956 Scholarship
Paul B. Odom Jr. Community Foundation Scholar Award
OKC Northwest Lions Club Scholarship
Oklahoma Academy of Physicians Assistants Scholarship
Oklahoma Fire Chiefs Association-Keith Bryan Memorial Scholarship
Oklahoma Goodwill Industries Abilities Scholarship
Oklahoma State Board of Architecture Path to Licensure Scholarship*
Oklahoma Youth with Promise Scholarship
Orner-Cook Scholarship
Deborah R. & Wayne A. Parker Scholarship
Sen. Homer Paul Memorial Scholarship for Pauls Valley High School
Almeda Kinch Pfleeger Scholarship*
Louise Harris Moore Phillips Duke University School of Nursing Scholarship
Pi Beta Phi Alumnae Club Scholarship
Pilot Club Scholarship
Floy I. Pinkerton Vocal Music Scholarship
Alice & Phil Pippin Eagle Scout Project Scholarship
Larry W. Roach Leadership Award
Jeffrey Rogers Education Memorial Scholarship
Anna-Faye Rose Scholarship
Mary Baker Rumsey Award-Junior League of Oklahoma City
Seay A. Sanders Jr. Scholarship
Harold W. Schmid Scholarship
Matthew George Scott - Bronco IV Ever Scholarship
Mary & Spencer Sessions Teaching Award-Guthrie Public Schools

William F. Shdeed Scholarship
Willie Elizabeth Shipley Scholarship
Jeannette Sias Music Scholarship for Oklahoma City University
Joe B. Smith Memorial Class of 1942 Scholarship
Robert V. & Ruby Mae Smith Memorial Scholarship
Pete & Lela Stavros Scholarship
Horace Stevenson Scholarship*
Wendell Steward Scholarship
Jason Sublette Heart of a Leopard Memorial Scholarship
Survivors' Education Fund
Jim Thomas/Berta Teague Scholarship*
Roy Edward & Darlene Young Thornton Scholarship
Troop 193 Leadership Scholarship
Mary E. Watkins Scholarship*
Carolyn Watson Opportunities Scholarship
Brian Wechsler Memorial Scholarship
Michael J. Weiss Scholarship
Western Oklahoma Building Trades Scholarship
Westmoore High School Alumni Scholarship
James Whitfield Employee Scholarship
Dean Wild Memorial Scholarship
Deral E. Willis Scholarship
James M. Wilson Scholarship
Mildred & William Young Scholarship
Dan Zanowiak Memorial Scholarship
Guy G. & Ginger S. Zimmerman OU Scholarship

Scholarship Match Helps Grow Student Awards

Through our scholarship program, we work with donors to help students who may not otherwise be able to afford higher education. In an effort to keep up with the rising cost of tuition, we provided an opportunity for donors to grow their scholarship funds, yielding increased award amounts for students.



In Fiscal Year 2016, we offered a match for donor contributions to the scholarship funds we administer, adding more than \$770,000 to 82 scholarships. More than 500 donors contributed a total of \$480,826 to the scholarship match, which ran from Aug. 1-Dec. 31, 2015. These gifts leveraged more than \$290,000 in matching dollars from the Oklahoma City Community Foundation. Thanks to this matching opportunity, our scholarship funds will award more dollars to college-bound students.

Charitable Organization Endowment Program

Since its beginning in 1970 with a \$25,000 gift to benefit the National Cowboy & Western Heritage Museum, the Oklahoma City Community Foundation's charitable organization endowment program has grown to nearly 360 funds with a total market value of \$167 million. In October 2016, these endowments generated \$8 million in annual distributions to participating charities.

Our Charitable Organization Endowment Program provides nonprofit organizations with a reliable source of income through annual distributions, as well as offers a simple way for donors to contribute. We administer endowments for a wide-range of charities in the community. These funds are instrumental to a nonprofit's stability, especially during uncertain economic times. We also provide development, communications, training, planned giving services and online resources, while working with staff and board members to help strengthen and increase their endowment funds.

Who can participate?

Any 501(c)(3) public charity serving Oklahoma can apply to participate. Upon approval, an endowment can be started with a minimum \$40,000 gift from the organization itself, from a donor or from a group of donors.

How does an endowment fund work?

Endowment funds at the Oklahoma City Community Foundation are invested in our general pool, so all funds – large and small – benefit from our investment performance. Our investment policy is designed to allow the funds to generate annual distributions to the charitable organization in perpetuity, while also growing and preserving the fund value. Participating charitable organizations receive an annual distribution check every fall. The distribution amount is calculated using 5 percent of the fund's average market value over the prior 12 quarters.

Central Oklahoma Charities

Find a listing of all charitable organization endowments, as well as links to make an online gift to each fund at occf.org/CentralOklahomaCharities.

Growing Endowments Through Planned Giving

We work with charitable organizations and their donors to facilitate a variety of gifts to benefit their endowment funds. A gift made through a will or trust is the simplest way for donors to leave a substantial gift. In 2016, we offered a series of trainings to help nonprofits better understand the various types of planned gifts and how to market those estate gifts to grow their endowment funds.

"The planned giving training was very beneficial," said Paul Moore, president of ESCCO, The Executive Service Corps of Central Oklahoma. "Many of our supporters are nearing retirement age, and estate gifts are an untapped resource. By working together with the Community Foundation, we can offer donors more flexible giving options and grow our endowment to ensure long-term support of our organization. It's a win-win."



Paul Moore, ESCCO president, with Gayle Farley, director of Oklahoma City Community Foundation's Charitable Organization Endowment Program



Gayle Farley
g.farley@occf.org
405/606-2910



Kenneth Conklin
k.conklin@occf.org
405/606-2926

To learn more about our charitable organization endowment program, visit occf.org/coeprogram or contact Gayle Farley or Kenneth Conklin.

Charitable Organization Endowment Funds



The organizations listed have established an endowment as of June 30, 2016. Endowment sub-funds with a value of \$10,000 or greater are listed under each parent organization and receive an annual distribution for a designated purpose. Organizations are categorized by service area. Find a complete list of charitable organization endowments, fund balances and distribution amounts at occf.org/coelist.

Arts & Culture

Allied Arts Foundation •
Ambassadors' Concert Choir
American Banjo Museum
American Choral Directors Association
Arts Council Oklahoma City
Canterbury Voices
Chamber Music in Oklahoma
• Berrien Kinnard Upshaw Chamber Music
Cimarron Opera
Fine Arts Institute of Edmond
Individual Artists of Oklahoma - Linda Jaeger Memorial
Jacobson Foundation
Jazz in June
KCSC Classical Music Foundation*
Ladies Music Club of Oklahoma City
Lawton Philharmonic Society
Lyric Theatre of Oklahoma
• Curt Schwartz Scholarship
Melton Art Reference Library - Legacy Collection
Jasmine Moran Children's Museum
National Cowboy & Western Heritage Museum •
National Cowboy & Western Heritage Museum Docent Council
OK Chorale
Oklahoma Arts Institute
Oklahoma Children's Theatre
Oklahoma City Ballet
Oklahoma City Museum of Art •
• Gene Barth Memorial Fund
• Fee-Milligan Endowment Fund
• Carolyn A. Hill Collections Endowment Fund
• James C. Meade Friends Lecture Series Endowment Fund
• James C. & Virginia W. Meade Acquisitions Fund for 18th & 19th Century American Art
• Robert & Harriette Orbach Endowment Fund
Oklahoma City Orchestra League
Oklahoma Community Theatre Association
• Lil Williams Festival Fund
Oklahoma Contemporary Arts Center
• Donald L. Jones Education Fund
• Warren Keigwin Fund*
• Rebecca McCubbin Education Fund
• Oklahoma Art League Fund*
• James Pickel Education Fund
Oklahoma Museums Association
Oklahoma Philharmonic Society •
• Fund for Collaborative Performances
Oklahoma Shakespeare in the Park

Oklahoma Visual Arts Coalition
Oklahoma Youth Orchestra
Oklahoma's International Bluegrass Festival*
Opry Heritage Foundation of Oklahoma
Paseo Artists Association
Photographic Society of America
Prairie Dance Theatre
Red Earth
• Kathleen Upshaw Fund
Science Museum Oklahoma •
• Oklahoma Air and Space Museum

Community Development Organizations

Association of Fundraising Professionals
ESCCO - Executive Service Corps of Central Oklahoma
Executive Women International
Groundswell International
Impact Oklahoma
Jewish Federation of Greater Oklahoma City
• Ralph Dorn Fund
Junior Hospitality Club
Junior League of Oklahoma City
Kiwanis Club Special Activities
Leadership Oklahoma City •
League of Women Voters of Oklahoma
McAlester Scottish Rite Temple Restoration/Education
Midwest City Rotary Foundation
National Society of Colonial Dames of America in Oklahoma
Navy League for USS Oklahoma City (SSN-723) US Navy TACAMO Wing, Tinker AFB
The Ninety-Nines Association of Women Pilots & Museum
Oklahoma Center for Nonprofits
Oklahoma City All-Sports Scholarship Relief Fund
Oklahoma City Crime Stoppers
Oklahoma City Fire Department Project Life Endowment
Oklahoma City Foundation for Architecture
Oklahoma City Housing Services Redevelopment Corp.
Oklahoma City Metro Literacy Coalition
• Mary Surbeck Literacy Fund
Oklahoma County Bar Foundation
Oklahoma Lions Service Foundation
Redbud Foundation
Rotary Club 29 Foundation
SHINE Foundation
Jim Thorpe Association
Women of AT&T, Oklahoma City Chapter
Women of the South

*New fund in FY2016 • Affiliated Fund, see page 46 for more information

Education: Community Organizations

Alliance Francaise d'Oklahoma, Inc
FOLIO - Friends of Libraries in Oklahoma
Friends of the Metropolitan Library System
Friends of the Mustang Public Library
Friends of the Norman Public Library
Institute of International Education

- Colin & Brooke Lee Fund
- Alice Pratt Internship Fund

Library Endowment Trust

- Nancy B. Anthony Library Endowment Fund

Oklahoma Humanities Council
Oklahomans for Special Library Services
Payne Education Center
Weatherford Public Library Foundation

Education: Preschool-12th Grade

Calumet School Foundation
Casady School

- Black Mesa Foundation Scholarship Fund
- Clements Fund
- Eleanor Kirkpatrick Fine Arts Chair Fund
- John E. Kirkpatrick Humanities Chair Fund
- Jane B. McMillin Memorial Fund
- Records Family Scholarship Fund
- Scholarships Fund
- Carolyn Young Hodnett Scholarship Fund

Christ the King Catholic School

- James C. & Virginia W. Meade Fund

Christian Heritage Academy
Crescent Public Schools Foundation
Deer Creek Public Schools Foundation •
Edmond Public Schools Foundation

- Rees Fund
- Eloise Rodkey Rees Inspirational Essay Award

El Reno Public School Foundation - Wilbur & Jean Gardner Scholarship

- Willa Mae Hutchinson Memorial Scholarship Fund*
- Leslie F. Roblyer Leadership Grant
- Jeremy Thompson - Wade Kubon Memorial Scholarship Fund
- Ryan Tinsley Memorial Scholarship Fund*
- Robert & Lorena Walker High School Support Grant*

The Foundation for Oklahoma City Public Schools

- Anna & Calvin Wickham - Classen School of Advanced Studies Piano Department Fund

Guthrie Educational Foundation
Harding Fine Arts Academy - John & Joy Reed Belt Arts & Education Fund
Heritage Hall School •

- Landscaping Endowment Fund
- Reynolds Endowment Fund
- Teacher Endowment Fund

Kingfisher Educational Foundation
Erna Krouch Preschool

Bishop McGuinness Catholic High School
Midwest City-Del City Public Schools Foundation
Millwood School District Enrichment Foundation
Moore High School Alumni Association Scholarships

- 70s Legacy Scholarship
- George & Doral Hopper Scholarship
- Hoby & Anita Horn Scholarship
- Moore High School Alumni Association
- Music Scholarship
- Bennie Raine Scholarship

Moore Public Schools Foundation for Academic Excellence
Mount St. Mary Catholic High School

- Tom Swyden Fund

Noble Public Schools Foundation for Academic Excellence
Oklahoma Christian School
Oklahoma FFA Foundation

- Oklahoma Farm Bureau Fund
- Steve & Merrie Lynn Vaughan Fund

Oklahoma Foundation for the Education of Blind Children & Youth
Oklahoma Foundation for Excellence
Oklahoma School of Science and Mathematics

- Gary Salwierak Fund

Positive Tomorrows
Purcell Public School Foundation*
Putnam City Public Schools Foundation
Rosary Catholic School
Sacred Heart Catholic School
Southeast High School Alumni Support
Special Care
St. Charles Borromeo Catholic School
St. James Catholic School
St. John Christian Heritage Academy - Waltine Lynette Jackson Endowment
St. John's Episcopal School

- Calvin & Peola Battle Scholarship Fund
- Edward Wade Dalton Memorial Fund

St. Mary's Episcopal School of Edmond

- Nancy Rice Hetherington Endowment Fund

St. Elizabeth Ann Seton Catholic School
Trinity School
Westminster School

- Gregory L. Shadid Memorial Scholarship Fund

Education: College, Universities & Vocational Schools

Hillel Foundation - University of Oklahoma

- Louis Berlowitz Lodge Fund
- Milton J. Gordon Memorial Fund
- John Horwitz Memorial Library Fund

Langston University

- Rachel Starks Durham Scholarship Fund
- Helen Aline Johnson Scholarship Fund
- Kirkpatrick Scholarship Fund
- Al Bert Prewitt Sr. & Audrey Monroe Prewitt Fund
- Baxter Tilford Scholarship Fund

Fundación Manos Juntas

Fundación Manos Juntas volunteer and donor Virgil Stout at the free clinic in Oklahoma City.

Planting the Seeds for Lasting Charitable Support

“It is only the farmer who faithfully plants seeds in the spring, who reaps a harvest in the autumn.”—B.C. Forbes

Virgil Stout understands that to reap a harvest, one must first plant the seeds. In 1994, after retiring as a computer programmer from the Kerr-McGee Corporation, he moved to Wellston, Oklahoma, to follow his dream of establishing a pecan orchard. As a child, he remembers his great-uncle’s pecan farm was the most beautiful land he had ever seen. Virgil planted seedlings and spent many years nurturing the young trees in hopes that one day he would have a verdant pecan orchard like he remembered from his childhood.

When he isn’t tending to pecan trees, Virgil volunteers for the Manos Juntas free clinic in Oklahoma City. Open every Saturday from 8-11:30 a.m., the clinic provides free medical care to patients in need at its location in the Penn Avenue Redemption United Methodist Church.

“What impresses me the most, is that we serve anyone who comes through the door regardless of their ability to pay,” Virgil said.

While serving as a board member, Virgil learned about the charitable organization endowment program at the Oklahoma City Community Foundation and realized an endowment fund could help sustain the organization well into the future.

“I waited a few years and kept thinking that someone else would start the fund,” Virgil said. “Then I realized that I was the one who could plant the seed.”

In 2016, his charitable gift created the Fundación Manos Juntas Dr. Boyd Shook Fund. The charitable organization endowment will yield an annual distribution to the clinic, and as more donors contribute, the distribution amount will grow, ensuring a stable source of income in the future.

Today, Virgil is not only reaping the harvest from the pecan seedlings he planted 20 years ago, but he has also helped ensure that the Manos Juntas free clinic will continue to serve patients in need for years to come.

Metro Technology Centers Foundation

Oklahoma Baptist University

- Business Program Fund
- Hobbs Lectureship Fund
- James Hurley Professorship Fund
- Scholarships Fund

Oklahoma Christian University

- Olen V. Hurst Scholarship Fund
- McBride Center for Faith & Literature Fund

Oklahoma City Community College

- Kamm International Student Scholarship Fund

Oklahoma City University

- Ray & Lucille Ackerman Oklahoma City University Marketing Scholarship
- Benham Professorship Fund
- Film Institute Fund
- Fine Arts Department Fund
- Richard Kells Memorial Scholarship
- Law School Dean's Fund
- Law School Seminar Fund
- Meinders School of Business OCU Steven C. Agee Economic Research and Policy Institute Fund*
- Meinders School of Business OCU Graduate Scholarship
- Meinders School of Business OCU Undergraduate Scholarship
- Petree School of Music Fund
- William & Pam Shdeed Law School Fund
- Societies Fund

Oklahoma State University - Oklahoma City

- Horticulture Center Fund
- Diane Miller Greenhouse Scholarship Fund
- Rumsey Garden Fund

Oklahoma State University - School of Civil & Environmental Engineering

- James D. & LaVerna L. Cobb Endowment Fund for OSU School of Civil and Environmental Engineering

Redlands Community College

- Alumni & Friends Association Scholarship
- Black Baseball Endowment Fund
- Casey Dell Brantley Scholarship
- Burrus Family Scholarship
- Michael Earl Cray Scholarship
- N.E. & Pearl Douglas Scholarship
- El Reno Chamber - Lesle F. Roblyer Memorial Scholarship
- El Reno Class of '65 Sophomore Scholarship*
- El Reno High School Class of '65 Endowed Scholarship
- El Reno Masonic Lodge #50 - Aggie Club Scholarship
- Scott L. Harlan Memorial Endowed Scholarship
- Howard & Rebecca Rainey Hutson Scholarship
- Drs. Owen & Bess Jenkins Endowed Scholarship
- T.G. Johnson Memorial Endowed Scholarship
- Cathi Kennedy Scholarship
- KLR Scholarship
- Tyler Knecht Memorial Endowed Scholarship
- Christopher Lane Scholarship

- Marie West Lyons Scholarship
- Masonic Fraternity of Oklahoma Endowment Fund
- Edna McMahon Kelly Memorial Endowed Scholarship
- Tommy Pinkston Family Memorial Scholarship
- Martha Piper Nursing Scholarship
- Ray Porter Scholarship
- Cheryl Ross Rinehart Memorial Nursing Scholarship
- Renna V. Royse Scholarship
- Virdin Royse Memorial Endowed Scholarship
- James Shaw Scholarship
- Doris Anne Smith Transfer Scholarship
- Trotter-Gambel Scholarship
- Henry Jo Von Tungeln Memorial Agriculture Scholarship
- Ruth Louise Wallace Nursing Endowed Scholarship

Southern Nazarene University Scholarship

Southwest Park and Recreation Training Institute*

St. Gregory's University

- Vogt Fund

Francis Tuttle Foundation

United States Air Force Academy - John E. Kirkpatrick Fund

United States Military Academy - John E. Kirkpatrick Fund

United States Naval Academy - John E. Kirkpatrick Fund

University of Central Oklahoma

- Department of History and Geography - Diane Neal Kremm Fund
- Fine Arts Fund
- Kirkpatrick Service Awards Fund
- Nursing Scholarship Fund

University of Oklahoma Health Sciences Center

- Alumni Association Research Fund
- Robert M. Bird Society Fund
- Watson Scholarship Fund

University of Oklahoma - Norman Campus

- Air Force ROTC Detachment 675 Fund*
- Bizzell Memorial Library Fund
- Jerry Cooper Marching Band Scholarship Fund
- Fred Jones Jr. Museum of Art Fund
- Naval ROTC Fund
 - Oklahoma Naval ROTC - Capt. Robert J. Kelsey Fund

Educational Support Organizations

Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha

Markoma Christian Ministries

Oklahoma Engineering Foundation Scholarship

Oklahoma National Guard Association Scholarship Foundation

Oklahoma Pilots Association Vic Jackson Scholarship

Oklahoma Youth Expo - Davis/Stephens Scholarship

OSU - Agricultural Education Scholarship Inc.

Will Rogers Air National Guard Scholarship

Society of Petroleum Engineers International, Oklahoma City Section Scholarship

Marie Welch Independent Insurance Agents of Oklahoma Scholarship

A. Kurt Weiss Lectureship

Environment & Animal Organizations

Best Friends of Pets
Central Oklahoma Humane Society
Choctaw Parks Foundation - Historical Sculpture Gardens
 Perpetual Care
Free to Live
Friends of Martin Park Nature Center
Morris Animal Foundation
Myriad Gardens Foundation
 • Meinders Building and Maintenance Endowment for Myriad Gardens
 • Meinders Garden Maintenance Endowment for Myriad Gardens
The Nature Conservancy - Oklahoma Chapter
 • James K. Hotchkiss Endowment
OKC Beautiful
 • Morrison Tucker Award
 • Wildflowers Fund
Oklahoma City Boathouse Foundation
Oklahoma City Geological Foundation
Oklahoma Horticultural Society
Oklahoma Iris Society
Oklahoma River Foundation
Oklahoma Zoological Society
The Tree Bank

Health-Related Organizations

Ability Connection Oklahoma
Alzheimer's Association - Oklahoma Chapter
American Cancer Society
American Diabetes Association
Arthritis Foundation - Oklahoma Chapter
Cavett Kids Foundation
The Children's Center
 • The Children's Center Foundation
Children's Hospital Foundation
Community Health Center - Mary Mahoney Memorial Health Center
Epilepsy Association of Oklahoma
Fundación Manos Juntas - Dr. Boyd Shook Fund*
Health Alliance for the Uninsured
Hearts for Hearing Foundation
Integrus Foundation
 • Baptist Burn Center Fund
 • James L. Hall Jr. Center for Mind, Body & Spirit Fund
 • Integrus Southwest Medical Center Fund
The Leukemia & Lymphoma Society
Lupus Foundation of Oklahoma
Dean McGee Eye Institute
Mental Health Association Oklahoma
Mercy Health Center
National Multiple Sclerosis - Oklahoma Chapter
NorthCare
Oklahaven Children's Chiropractic Center
Oklahoma Blood Institute
Oklahoma Brain Tumor Foundation

Ensuring the Music Plays On

More than 50 years ago, John Kirkpatrick, founder of the Oklahoma City Community Foundation, played an instrumental role in bringing performing arts to our community. He and other civic leaders established the area's first professional theatre company, Lyric Theatre of Oklahoma. Since its inaugural production of *Oklahoma!* in 1963, Lyric Theatre has continued to enrich the community year after year with Broadway-caliber theatre productions.

In 1971, Mr. Kirkpatrick further secured the future of professional theatre in Oklahoma City by helping to establish a charitable organization endowment fund for Lyric Theatre at the Oklahoma City Community Foundation. The endowment provides annual support for Lyric Theatre productions, as well as musical theatre training for students ages 5-18 at the Thelma Gaylord Academy.

"Thanks to our endowment, we are able to distribute academy scholarships to deserving students focused on expanding their musical theatre education," said Paula Stover, Lyric Theatre of Oklahoma managing director. "It also helps with operating expenses, as it is crucial for us to defray our costs. Ticket sales provide only 60 percent of our budget, with the rest met through fundraising. While very few donors allow funding to be put towards operating, we are beyond grateful for the foundation's endowment support, and we look forward to a long-lasting relationship with them for years to come."

The cast of Lyric's 2016 production of THE WIZARD OF OZ.

Photo by KO Rinearson



Oklahoma Caring Foundation
Oklahoma Heart Hospital Research Foundation
Oklahoma Medical Research Foundation

- Fleming Scholarship Fund
- D. Allan & Dorothy B. Harmon Memorial Fund
- Research Fund

Oklahoma Physical Therapy Foundation
Planned Parenthood of Central Oklahoma
Prevent Blindness Oklahoma
Russell-Murray Hospice
St. Anthony Hospital Foundation
Stroud Regional Medical Center Foundation
Variety Care

- Variety Care Foundation Fund

History & Preservation Organizations

45th Infantry Division Museum
95th Division Foundation
Arcadia Historical & Preservation Society
Break O' Day Farm and Metcalfe Museum
Cleveland County Historical Society
Edmond Historical Society
Freedoms Foundation at Valley Forge Medal of Honor Maintenance
Friends of Oklahoma Historical Society Archives
Frontier Country Historical Society
William Fremont Harn Gardens and Homestead

- 1889er's Fund

Lincoln County Historical Society - James A. Embry Fund*

Military Order of the World Wars

Oklahoma Archaeological Survey

Oklahoma City-County Historical Society

Oklahoma Hall of Fame

- Gary & Elizabeth Huckabay Scholarship Fund
- Scholarship Fund

Oklahoma Historical Society

- Emily Bell Fund
- Cross S Ranch Fund
- Guthrie Carnegie Library Fund
- Meinders Red River Journey Fund
- Murrell Home - Nell Bradshaw Fund
- Shirley Ann Ballard Nero Fund*
- Oklahoma History Center Fund
- Nahzi & Annette Zuhdi Fund

Oklahoma Military Hall of Fame

Oklahoma Railway Museum

Oklahoma Society Daughters of the American Revolution

- Ardmore Chapter Scholarship
- Cameo Society Fund
- Oklahoma City Chapter Fund
- Oklahoma Hearts and Hands Healthcare Scholarship
- Scholarship Program
- Veterans First Program Fund

Oklahoma State Firefighters Museum

Oklahoma Westerners Indian Territory Posse

Overholser Mansion

- Dianne Gumerson Memorial Fund

Preservation Oklahoma
Stillwater Museum Association - Sheerar Museum
Westerners International

Neighborhood Associations

Crown Heights-Edgemere Heights Neighborhood Association
Edgemere Park Preservation Area
Historic Brookhaven Neighborhood Association
Mesta Park Neighborhood Association
Neighborhood Alliance of Central Oklahoma
Putnam Heights Preservation Area - Anderson Family Endowment
Shartel Boulevard Development Authority

Religious Organizations

4HIM - His Healing Helping Hands International Ministries
All Souls' Episcopal Church

- Music Fund

Assemblies of God of Oklahoma Foundation
In Search of The Lord's Way

- Bill Phillips Fund

Life.Church
Scope Ministries International
Sisterhood of Temple B'nai Israel

- Seligson Flower Fund

Sisters of Benedict
St. Paul's Episcopal Cathedral
Temple B'nai Israel Centennial Fund

Senior Adult Service Organizations

Areawide Aging Agency
Baptist Village Communities – Oklahoma City location
Daily Living Centers
Edmond Mobile Meals
Edmond Senior Community Foundation
Foundation for Senior Citizens
Oklahoma Alliance on Aging
Oklahoma County Senior Nutrition Program
Rebuilding Together OKC
RSVP - Retired & Senior Volunteer Program of Central Oklahoma

Social Services Organizations

Mary Abbott Children's House
Aid for Individual Development
American Red Cross of Central Oklahoma
CARE - Child Abuse Response and Evaluation Center
CASA of Oklahoma County
Catalyst Behavioral Services
Catholic Charities of the Archdiocese of Oklahoma City

- Building Fund*

Center for Children and Families, Inc.
Central Oklahoma Association for the Deaf & Hard of Hearing
A Chance to Change

*New fund in FY2016 • Affiliated Fund, see page 46 for more information

Citizens Caring for Children
 City Rescue Mission
 Coffee Creek Riding Center
 Consumer Credit Counseling Services of Central Oklahoma
 Deaconess Pregnancy & Adoption
 EARC - Employment & Residential Centers
 Easter Seals of Oklahoma
 Faith Works of the Inner City
 Firststep - OKC Metro Alliance
 Genesis Project
 Goodwill Industries of Oklahoma
 HeartLine
 Hope Center of Edmond
 Infant Crisis Services
 Jesus House
 Legal Aid Services of Oklahoma

- Stan Foster Senior Law Fund
- Judge Eugene H. Mathews Fund

 Limbs for Life Foundation
 Lions Meadows of Hope/Oklahoma Lions Boys Ranch
 Make-A-Wish Foundation of Oklahoma
 Make Promises Happen - Central Oklahoma Christian Camp
 McCall's Communities for Life Enrichment
 Meadows Center for Opportunity
 NAIC - Norman Addiction Information & Counseling
 Neighborhood Services Organization
 NewView Oklahoma
 OIC - Opportunities Industrialization Center
 Oklahoma Baptist Homes for Children

- Russell & Sue Adams Fund
- Boys Ranch Town - Boone Transitional Living Fund
- Tilda Caruthers Educational Fund

 Oklahoma Foundation for the Disabled
 Oklahoma Halfway House
 Oklahoma Lawyers for Children
 Parent Promise
 Peppers Ranch
 Rainbow Fleet
 Regional Food Bank of Oklahoma
 Reliant Living Centers of Oklahoma
 Dale Rogers Training Center
 SAFY - Specialized Alternatives for Families & Youth
 The Salvation Army

- Building Maintenance Fund
- Ed Leslie Fund

 Skyline Urban Ministry
 Special Olympics Oklahoma
 Speck Homes
 Sunbeam Family Services
 TEEM - The Educational and Employment Ministry
 TRC - The Recovery Center
 Trinity Legal Clinic
 United Methodist Boys Ranch
 United Way of Central Oklahoma

Upward Transitions
 Urban League of Greater Oklahoma City
 The Urban Mission
 White Fields
 Willow Springs Boys Ranch
 Work Activity Center
 World Neighbors
 Youth & Family Services*
 Youth Services for Oklahoma County
 YWCA Oklahoma City

Youth-Serving Organizations

American Energy Swim Club
 Big Brothers Big Sisters of Oklahoma
 Boy Scouts of America - Last Frontier Council
 Boys & Girls Clubs of Oklahoma County

- Aubrey McClendon Memorial Fund*

 Camp Fire USA - Heart of Oklahoma Council
 Fields & Futures Foundation
 Girl Scouts - Western Oklahoma

- Capital Endowment Fund

 Junior Achievement of Oklahoma
 Oklahoma City Police Athletic League
 Oklahoma FCA

- Stephen B. Payne FCA Scholarship Fund

 Oklahoma Kidz Charities
 Denny Price Family YMCA of Enid
 Salvation Army Boys and Girls Club of Oklahoma City
 United National Indian Tribal Youth - UNITY
 Whiz Kids - City Care
 YMCA - Oklahoma City

- Camp Classen Fund
- Downtown Branch Fund
- Eastside Branch Fund
- Eberly Scholarships for Camp Classen
- Northside Branch Fund

 Youth Leadership Exchange

- Mary L. Walsh YLX Scholarship



The Leadership Oklahoma City Signature Program commences with an opening retreat designed to build connections among class members.

“Leadership Oklahoma City’s funds at the Oklahoma City Community Foundation are game-changers. The endowment allows us to produce our Youth Leadership Exchange programming free of charge to its participants, which opens the program to teens from varying backgrounds and experiences. The ability to leverage contributions while maintaining a perpetual source of funding is an enormous gift to the community from OCCF.”

Beth Shortt
Leadership Oklahoma City

Charitable Organization Endowment Affiliated Funds

The permanent endowment funds listed below provide long-term support for charitable organizations. These funds were established with a minimum of \$1 million and operate under a specific set of governing documents and structure. Each endowment has its own group of Trustees, with the majority appointed by the Trustees of the Oklahoma City Community Foundation. The funds are listed with the date established.

Allied Arts Foundation | 1995

Allied Arts supports arts organizations in central Oklahoma through an annual fundraising campaign, and helps provide free or low-cost arts and cultural events for the community.

Deer Creek Public Schools Foundation | 1994

The foundation supports academic enrichment opportunities for students and grants for teachers in the Deer Creek Public School District in Edmond, Oklahoma.

Heritage Hall | 1996

Located in north Oklahoma City, Heritage Hall is an independent, coeducational college-preparatory school for students in preschool through 12th grade.

Leadership Oklahoma City | 1993

The nonprofit organization provides leadership training to create and educate a network of community leaders with a broad understanding of the Oklahoma City community.

National Cowboy & Western Heritage Museum | 1989

Located in northeast Oklahoma City, the museum houses an extensive collection of Western art and artifacts and sponsors educational programs to stimulate interest in the history and culture of the American West.

Oklahoma City Museum of Art | 1991

Located in downtown Oklahoma City, the museum is home to a permanent collection of European and American art including the world’s largest collection of Dale Chihuly art glass. The museum also features national and international traveling exhibitions, a film program and art education classes.

Oklahoma Philharmonic Society | 1994

The fund supports the Oklahoma City Philharmonic, an orchestra that performs a series of classical, pops, discovery and family concerts at the Civic Center Music Hall and other community venues. In addition, Oklahoma City Philharmonic provides collaborative performances with groups including the Oklahoma City Ballet and Canterbury Voices.

Science Museum Oklahoma | 1991

Founded by John E. Kirkpatrick originally as the Kirkpatrick Center, the museum offers hands-on exhibits, educational programs and activities that promote science literacy for youth and adults at its location in northeast Oklahoma City.



Central Oklahoma has many charitable organizations working to help the community, as well as generous donors looking to make a difference. Through GiveSmartOKC.org, we are working to connect these important community partners to encourage informed and impactful charitable giving. Free for the public to use and free for nonprofits to participate, GiveSmartOKC.org provides in-depth and comparable data to help donors make smart decisions and build connections, allowing nonprofits to make a real impact in our community.

A Giving Resource for Donors

Donors use GiveSmartOKC to find charities that fit their interests and to learn more about the organization, helping them decide where their charitable dollars will have the most impact. You can search a list of more than 270 area charitable organizations on GiveSmartOKC, narrowing your interests down using keywords, categories or even geographic areas.

An Outreach Tool for Nonprofits

GiveSmartOKC allows nonprofits to better tell their story and boost awareness of their accomplishments. Powered by GuideStar USA, GiveSmartOKC is the local onramp that channels nonprofit data to the nationally recognized nonprofit search engine. A GiveSmartOKC profile not only connects charities with local supporters, but the data is also shared with GuideStar's national network of more than 120 philanthropic partners including Amazon Smile, Network for Good and VolunteerMatch.

To learn how you can start using GiveSmartOKC to make a greater impact in the community, visit GiveSmartOKC.org or contact Ashlee Adams.



Ashlee Adams
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405/606-2918

GiveSmartOKC

Know More. Give More.

Sharing Data for Smart Giving Decisions

GiveSmartOKC is a powerful resource for both donors and charitable organizations in central Oklahoma. Steve Agee, dean of the Meinders School of Business at Oklahoma City University, has had the opportunity to use GiveSmartOKC from both viewpoints. As an Oklahoma City Community Foundation Trustee and community leader, he says the website has allowed him to learn more about the charities he cares about.

"GiveSmartOKC gives you all of the tools you need to assess different philanthropic organizations that you may have a passion for," Agee said. "For anyone who has a taste for philanthropy as a donor, I strongly suggest you take a look at GiveSmartOKC. You can identify your charitable interests and passions, and simply click on those organizations to learn more about them."

Agee says having a presence on GiveSmartOKC has also been beneficial for the Meinders School of Business. "We have set up endowments at the Oklahoma City Community Foundation for undergraduate and graduate students, as well as for our Economic Research and Policy Institute," he said. "It's important for me, as the dean, to get that message out to a potential

donor base we might not have otherwise seen or known about. GiveSmartOKC is the perfect platform to accomplish that goal."

Steven C. Agee, Ph.D.
Dean, Meinders School of Business



Wellness Initiative



With the nation's eighth-highest obesity rate and fourth-highest mortality rate, Oklahoma continues to face challenges in improving the health of our residents. In central Oklahoma, a number of entities are taking action to create a healthier community. In 2014, Oklahoma City Community Foundation Trustees launched the Wellness Initiative to support this important work and to build a collaborative network of partners focused on creating a culture of wellness in our community.

The Wellness Initiative is working to improve physical activity, good nutrition and healthy lifestyle choices among our community residents through the following programs:

GetMovingOKC.org - The free, online resource features a calendar of activities, as well as a map and information about available trails, parks and other facilities where residents can get moving.

OK 5210 - A key component of our Wellness Initiative, the "5210 daily numbers to live by" message is brought to our community in partnership with the YMCA of Greater Oklahoma City. The numbers encourage healthy behaviors including five or more fruits and vegetables, two hours or less of screen time, one hour or more of physical activity and zero sugary beverages each day.

Central Oklahoma Wellness Alliance - This network of community partners is collaborating to improve health outcomes and encourage healthy lifestyle choices in central Oklahoma. To get involved, contact Sally Ray at s.ray@occf.org.

Wellness Initiative Grants - Grants are awarded for community-based programs encouraging healthy lifestyle behaviors based on the OK 5210 message to prevent future illness and disease. Since 2014, \$476,984 has been awarded to 14 organizations.

Wellness Initiative Grants

Awarded during the fiscal year that ended June 30, 2016

ASTEC Charter School - \$21,500 for the HOPSports for Healthy Kids program that provides students with opportunities for physical activity during class time to prevent inactivity.

INTEGRIS Foundation - \$25,100 for the Challenge Yourself: Health and Fitness program that provides free exercise classes as well as health and nutrition education for adults in the Oklahoma City metro area.

Metro Technology Centers - \$25,000 to support the MetroFit Free Community Fitness program, providing more convenient access to health and wellness classes for northeast Oklahoma City residents.

Myriad Gardens Foundation - \$30,000 for the Myriad Life: Food, Fitness, Frame of Mind program that provides free wellness activities including healthy cooking, exercise and meditation classes.

Oklahoma City Boathouse Foundation - \$30,000 for the FitQuest+ program to offer nutrition and fitness activities including rowing and kayaking for Oklahoma City area schools.

Oklahoma City Community College Foundation - \$19,900 to support the Walk Fit community health program offering free access to the campus wellness center, walking activities and nutrition education for south Oklahoma City residents.

Rainbow Fleet - \$22,000 for the Healthy Bodies, Healthy Minds program that provides training and resources for child care professionals to integrate health and wellness activities that promote good nutrition and physical activity for children.

Regional Food Bank of Oklahoma - \$5,000 to evaluate the Fresh Rx program that is designed to improve health outcomes for low-income individuals with little or no access to nutritious food options.

Grants awarded through the Fund for Oklahoma City

Health Alliance for the Uninsured (HAU) - \$25,000 to support Care Connection, a shared electronic medical record system for HAU partner clinics. The systems allows providers to better coordinate diagnostic care, specialty care and surgeries for low-income, uninsured patients.

YMCA of Greater Oklahoma City - \$28,500 to support the OK 5210 initiative that promotes healthy eating, active living and the prevention of obesity. The OK 5210 message encourages individuals to adopt healthy behaviors by including five or more fruits and vegetables, two hours or less of screen time, one hour or more of physical activity and zero sugary beverages into their regimen each day.

Turning Healthy Choices Into Child's Play

Poor health in childhood can have profound impacts throughout a child's life.

Research shows that healthy children are better learners, perform well in school and are more likely to become healthy adults. With the help of a grant from our Wellness Initiative, the nonprofit organization Rainbow Fleet is training child care professionals in central Oklahoma to encourage healthy behaviors in children, ensuring they get started on the right track.

Through the Healthy Bodies, Healthy Minds program, Rainbow Fleet offers child care providers monthly training and resources designed to develop healthy habits among the children in their care. The program is based on the OK 5210 message of five or more fruits and vegetables, two hours or less of screen time, one hour or more of physical activity and zero sugary beverages each day.

"Many child care providers just don't have the right materials to encourage healthy behaviors," Rainbow Fleet executive director Carrie Williams said. "Thanks to the Wellness

Initiative grant, we were able to provide more than \$300 worth of materials and toys designed for active play to each of the 30 participating providers."

The child care professionals participating in the program include 20 family child care homes, as well as 10 child care centers located in low-income areas of Oklahoma County. Williams says they've seen positive behavior changes among the child care providers and increased physical activity among the children in their care.

"Many of the providers are offering healthier nutritional choices such as water instead of a sugary beverage like juice," Williams said. "They are also serving more fruits and vegetables, and physical activity has become a larger part of the children's daily routines."



To learn more about the Wellness Initiative, visit occf.org/wellnessinitiative or contact program officer Sally Ray.



Sally Ray
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As we strive to bring resources together to meet the changing needs of the community, initiatives often emerge from our work with donors. After a \$1.5 million gift from the estate of donor Margaret Annis Boys created an endowment in 1991 for public beautification, we recognized a community need to not only beautify public lands, but also to support the development of Oklahoma City's parks. Out of Miss Boys' generous gift grew our Parks & Public Space Initiative to improve and encourage the use of public parks and outdoor spaces throughout Oklahoma County. Through the initiative, we award grants to

neighborhood and community groups, churches, nonprofits and government agencies for programming, stewardship and other improvements in our community's parks, trails and public spaces.

Now in its 25th year, the Margaret Annis Boys Trust together with the Parks & Public Space Initiative has invested \$3.2 million in central Oklahoma through nearly 300 public beautification projects. These projects include 115 schools and libraries throughout Oklahoma County.

Parks & Public Space Initiative Grants

\$272,381 awarded during the fiscal year that ended June 30, 2016

Belle Isle Enterprise Middle School – \$22,341 for improvements to the school grounds including the planting of trees and the installation of a shade structure and sand volleyball court to create a more usable space for the northwest Oklahoma City school and surrounding neighborhood.

Choctaw Parks Foundation – \$5,450 for plant materials to support the Choctaw Historical Sculpture Gardens along a one-half mile stretch of Northeast 23rd Street in Choctaw, Oklahoma.

City of Edmond – \$5,196 for plantings to help beautify and provide shade and wind barriers to the Sunset Elementary School grounds, creating a more enjoyable space for students and the surrounding community.

City of Oklahoma City Parks and Recreation Department - \$95,000 for a comprehensive tree inventory to geo-locate up to 20,000 trees in Oklahoma City's public parks, trails and medians, providing a detailed analysis of tree health and condition.

Edgemere Park Preservation – up to \$30,000 for plant materials and irrigation that will be coordinated with drainage improvements in Edgemere Park.

Northridge Elementary – \$30,000 to improve their existing campus playground by adding an asphalt walking track for the school, neighborhood and community groups to utilize.

Oklahoma City Bicycle Society /OKC Running Club – \$15,000 for the installation of information boards along the Oklahoma City trail system to help keep walkers, runners and cyclists informed. A bike rack will also be installed at Crystal Lake in Oklahoma City.

Oklahoma City Housing Authority – \$40,500 for the planting of shade trees at the Oak Grove Housing Project in southwest Oklahoma City. The trees will provide shade for improved walkability along sidewalks throughout the property and increase usage of the playground areas.

Putnam City Public Schools Foundation – \$28,894 to help improve the Hilldale Elementary School grounds and adjacent park by adding a pavilion area, establishing outdoor learning centers and garden and providing community outreach.



Brian Dougherty
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To learn more about the Margaret Annis Boys Trust and Parks & Public Space Initiative, visit occf.org/parks or contact program officer Brian Dougherty.

A photograph of two arborists from the Davey Tree Expert Company standing in a grassy area with trees in the background. They are wearing safety vests and hard hats. The vest on the left is yellow with 'DAVEY TREE EXPERT' written on it. The vest on the right is light blue with 'DAVEY TREE EXPERT' written on it. They are looking towards the trees.

Teaming Up to Help Urban Forests Flourish

The trees that line our city streets and give character to our neighborhoods aren't just pleasing to the eye. In fact, the collective benefits of trees are so great that a significant loss has the potential to create staggering effects in the community. The Oklahoma City Community Foundation is taking steps to ensure our city's trees continue to thrive through a grant to support a comprehensive tree inventory.

"This will not only aid our grounds and forestry crews with ongoing tree maintenance and assessing the health of our trees, but will provide park horticulturalists and planners with the tools they need to develop a succession plan to ensure the continuity of our parks' urban forest for many years to come," said Douglas Kupper, Parks & Recreation director.

In addition to their obvious beauty, trees help to increase property values, clean the air, reduce erosion and trim energy costs. The trees in our community also create more enjoyable parks and neighborhoods, promoting walking and outdoor recreation. By working together with the City of Oklahoma City and Oklahoma Forestry Services, we are helping to create a detailed analysis of the health and condition of the trees in our urban forest. Conducted by professional arborists from the Davey Tree Expert Company, the inventory will provide an interactive, online database of trees in 157 city parks, trails and medians.

Brian Dougherty with our Parks & Public Space Initiative said the tree inventory will strengthen the city's ability to protect against threats like the emerald ash borer. The wood-boring beetle has caused the loss of millions of ash trees across the U.S. and was discovered in northeastern Oklahoma in October 2016.

"Thanks to the tree inventory data, we can easily identify the locations of all ash trees in the community," Brian said. "We can also identify the larger, more successful ash trees and use our resources more efficiently to help save those trees. Without the data and technology from the inventory, this would be like finding a needle in a haystack."

During May-October, a team of arborists from the Davey Tree Expert Company canvassed Oklahoma City's public parks, trails and medians collecting data to determine the location, species and health of the trees in our community.



An initiative of the Oklahoma City Community Foundation Trustees, the iFund program utilizes gifts from donors to support services for children and elderly, as well as provide access to health care. Since 2011, the iFund program has awarded more than \$2.5 million to charitable organizations serving central Oklahoma. For more information, visit iFundOKC.org.

Coordinating Health Care for Oklahoma City's Homeless

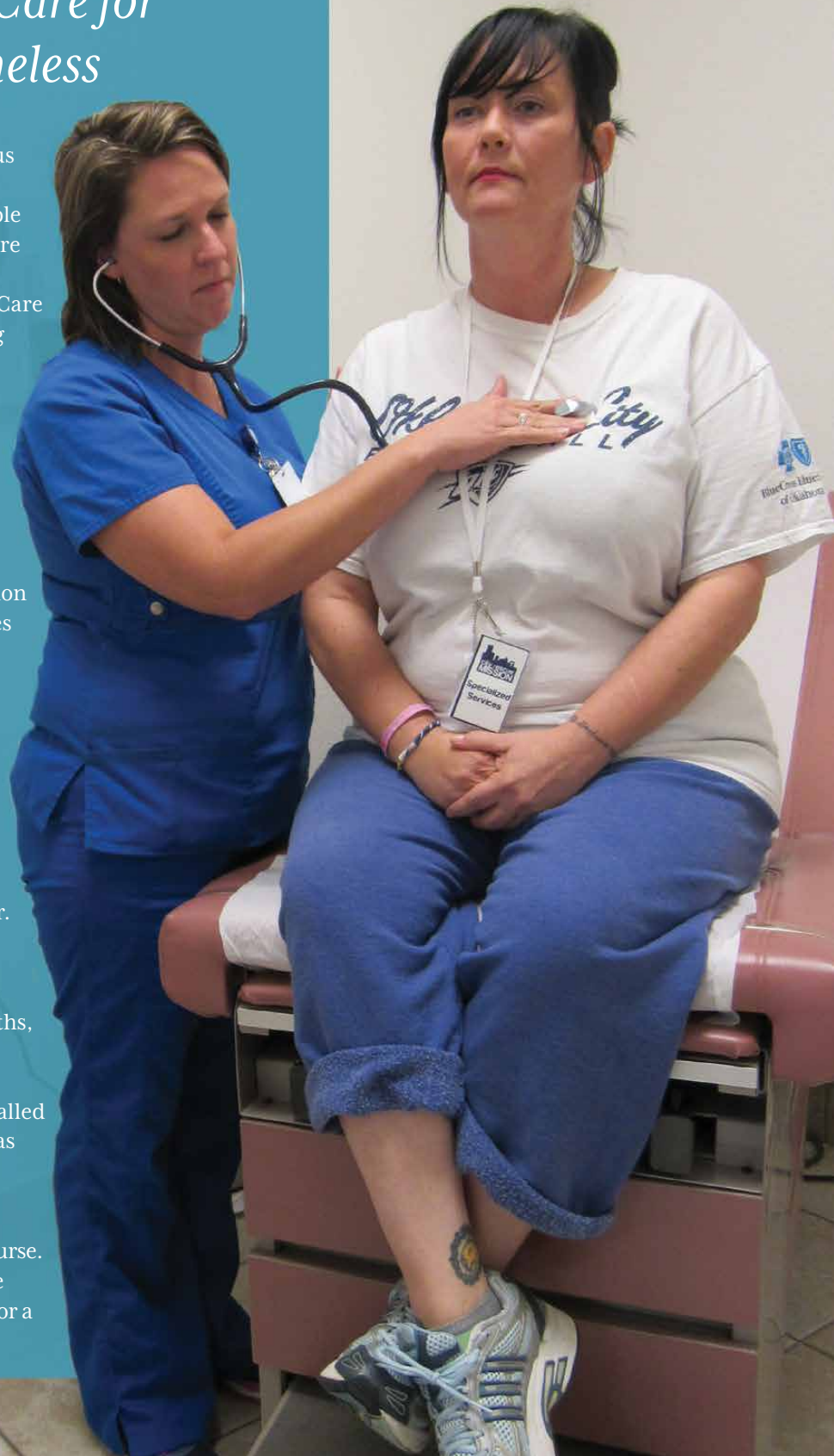
For residents of City Rescue Mission, the struggles of homelessness can present serious barriers to maintaining their health. When faced with the challenges of finding affordable housing and a sustainable income, health care is often just one more obstacle to overcome. Thanks to a grant from our Access to Health Care iFund program, a new triage clinic is making health care more attainable for Oklahoma City's homeless population.

The clinic is a collaboration between City Rescue Mission and Open Arms Clinic, a charitable health care provider that has been serving Oklahoma City since 1993. Located onsite at City Rescue Mission, the clinic provides free medical services to mission residents through a triage nurse who assesses the level of care needed and coordinates follow-up services.

"When you have a significant homeless population without access to basic health care, they are often left with no choice but to use expensive emergency services that can have a tremendous impact on the community," said Rosemary Hayes, Open Arms development and volunteer coordinator.

The triage clinic is helping to eliminate the use of emergency medical services for non-emergency needs. Within the first four months, the clinic served 329 patients, with only 30 requiring emergency care. Before the clinic opened, City Rescue Mission says EMS was called on a daily basis. Now, the rate of EMS calls has dropped by 24 percent.

"Many patients don't have access to over-the-counter medications," said the clinic's triage nurse. "With the opening of the clinic, they can now be treated for minor ailments such as a migraine or a rash without ever leaving the facility."



Access to Health Care Grants

\$167,000 awarded November 2015

D-DENT (Dentists for the Disabled and Elderly in Need of Treatment) – \$15,000 to provide comprehensive dental care to low-income, uninsured veterans, elderly and disabled citizens through Community Dental Day events.

Fundación Manos Juntas – \$20,000 over a two-year period for a diabetes management and education program for diabetic and pre-diabetic patients at the Manos Juntas Free Clinic in Oklahoma City.

Good Shepherd Ministries – \$12,000 to provide low-income, uninsured, pre-diabetic and newly-diagnosed diabetic patients in Oklahoma City with supplies, medications and education to control their diabetes.

Latino Community Development Agency – \$35,000 to provide breast and cervical cancer education, screening, referrals and comprehensive patient navigation for Latina women in central Oklahoma.

Mental Health Association Oklahoma – \$12,500 for the Sunbridge screening program that provides preventive care including mental health education, screening and referral services to adults age 65 and older.

Neighborhood Services Organization – \$25,000 for the dental outreach and education program for low-income children and adults throughout Oklahoma City.

Open Arms Clinic – \$40,000 to help establish the City Rescue Mission Triage Clinic to provide access to integrated health care for homeless individuals.

Parkinson Foundation of Oklahoma – \$7,500 to provide the PWR! Moves exercise program for Parkinson patients in Oklahoma City.

Services for Elderly Grants

\$80,000 awarded February 2016

Hearts for Hearing Foundation – \$20,000 for the Learning to Listen Again project for seniors over the age of 75 who have hearing loss and limited or no coverage for aural rehabilitation.

Oklahoma County Senior Nutrition Program – \$20,000 to serve meals to homebound seniors in Oklahoma County.

Rebuilding Together OKC Inc. – \$20,000 to provide emergency home repairs for low-income senior homeowners.

Regional Food Bank of Oklahoma – \$20,000 for the Senior Feeding program which consists of the senior homebound delivery and senior mobile pantry.

Opportunities for Children Grants

\$198,900 awarded August 2016

Citizens Caring for Children – \$15,000 to provide foster children the opportunity to visit the CCC Resource Center to receive new clothes, shoes, personal hygiene kits and books.

El Sistema Oklahoma – \$25,000 to expand the after-school music education program for third through ninth-grade students in Oklahoma City Public Schools.

Novo Ministries – \$10,000 to implement two weekly, faith-based after-school mentoring programs for elementary students in the greater Oklahoma City metropolitan area.

Oklahoma Children's Theatre – \$15,000 to continue funding of the Page to Stage literacy and arts program for second- and fourth-grade students.

Oklahoma City Ballet – \$15,000 to continue the BalletReach program that provides ballet lessons and ballet shoes to students in underserved, Oklahoma City elementary schools.

Oklahoma City Community College Foundation – \$14,000 for the Community After School Tutoring (CAST) program that provides tutoring for second-grade students in the Capitol Hill community.

Oklahoma City Museum of Art – \$7,750 to support the Healing Arts Outreach program that provides art education to children in the St. Anthony Behavioral Medicine Center.

Oklahoma City Police Athletic League – \$20,000 to provide sports leagues for students at underserved elementary schools in Oklahoma City.

Positive Tomorrows – \$25,000 to provide after-school tutoring, mentoring and enrichment activities in the new pre-K classroom at the Oklahoma City elementary school for children of homeless families.

Reaching Our City – \$16,200 to support the onsite, after-school tutoring and mentoring program for elementary students in the WestTen neighborhood that intersects the Western Heights and Putnam City Public School districts.

Whiz Kids Oklahoma – \$25,000 to purchase additional literacy resources for tutoring and mentoring programs for students in cooperation with 31 church groups.

Youth & Family Services – \$10,950 to support a year-round, arts-based enrichment program for children in foster care in the El Reno community.



The Kirkpatrick Family Fund, the largest affiliated fund at the Oklahoma City Community Foundation, was founded by John and Eleanor Kirkpatrick in 1989 with a mission to invest in ideas and leadership that contribute to and advance the cultural, intellectual and social interests of the communities it supports. Through the leadership of trustee and president Christian Keese, the Kirkpatrick Family Fund remains committed to adhering to the priorities and guiding principles of its founders.

To date, the Kirkpatrick Family Fund has expanded charitable giving across many areas of need, contributing more than \$79 million through project, operating and endowment-building grants. More than 650 qualified nonprofit organizations supporting charitable, civic and cultural causes have been impacted by this generosity in central Oklahoma and beyond.

Kirkpatrick Family Fund Large and General Operating Support Grants

Animals

Cheyenne Mountain Zoological Society – \$100,000 to support the new exhibits for hippos and penguins.

Humane Society of the Pikes Peak Region – \$25,000 for general operating support.

Arts and Humanities

Allied Arts Foundation – \$100,000 to support the 2016 annual campaign.

Arts Council of Oklahoma City – \$30,000 to support the All Access Arts program.

Chinati Foundation – \$50,000 to support the Chinati Foundation master plan.

Church in the Wildwood United Church of Christ – \$20,000 to support youth and music programming at the 2016 Green Box Arts Festival.

Colorado Springs Fine Arts Center – \$25,000 to support the Bemis School of Art education programs and museum free days.

Crowley Foundation Inc. – \$25,000 to support the purchase of technical equipment at the Crowley Theater Annex.

Fine Arts Institute of Edmond – \$20,000 for general operating support.

Green Box Arts Project – \$140,000 to support the 2016 Green Box Arts Festival and operation of the Green Box Workshop.

Oklahoma City Ballet – \$200,000 to support education programs and strategic planning.

Oklahoma Children's Theatre – \$15,000 for general operating support.

Oklahoma Contemporary Arts Center – \$1,009,600 for general operating support and program expansion.

Oklahoma Historical Society/History Center – \$110,000 to support the expenses associated with the Kirkpatrick Family Archive.

Oklahoma Humanities Council – \$30,000 to support Let's Talk About It, Oklahoma.

Oklahoma Museum Association – \$15,000 for general operating support.

Oklahoma Shakespeare In The Park – \$30,000 for general operating support.

Oklahoma Visual Arts Coalition Inc. – \$20,000 for general operating support.

Oklahomans for the Arts Inc. – \$30,000 for general operating support and membership expansion.

Oklahomans for the Arts Inc. – \$10,000 to support the Beyond Finances: Thriving Through Economic Challenges program.

Paseo Artists Association Inc. – \$15,000 for general operating support.

Red Earth Inc. – \$15,000 for general operating support.

William Fremont Harn Gardens – \$30,000 for general operating support.

Yukon Community Support Foundation – \$30,000 to support the production of the Iron Thistle, Chisholm Trail and the 2016 Freedom Festival.

Children, Youth & Families

Boys & Girls Clubs of Oklahoma County Inc. – \$25,000 for general operating support.

Center for Children and Families – \$30,000 for general operating support.

Infant Crisis Services – \$10,000 for general operating support.

Special Care Incorporated – \$25,000 for general operating support.

Urban Mission – \$20,000 to support the Kids in Need program.

YMCA - Camp Classen – \$25,000 to support the replacement of the shower house.

Youth Services for Oklahoma County – \$15,000 to support the Supporting Kids in Independent Living Program.



Now operating as a 501(c)(3) nonprofit organization for the Kirkpatrick Family Fund, the Kirkpatrick Family Farm in Yukon, Oklahoma, is home to a small number of sheep, donkeys, cows, chickens and honeybee hives providing education opportunities for youth and families. The farm, recently gifted by the Kirkpatrick family to the Kirkpatrick Family Fund, will continue the tradition of hosting numerous events and educational opportunities for the benefit of the community.

Kirkpatrick Family Farm

In Fiscal Year 2016, one of the oldest pieces of continually-owned family real estate in Oklahoma was donated by members of the Kirkpatrick family to the Kirkpatrick Family Fund at the Oklahoma City Community Foundation. This donation will ensure the protection of the property for public use and wildlife protection for generations to come.

The 33-acre Spencer Homestead was originally purchased in 1894 by Mollie Spencer, whose husband, L.M. Spencer, and brother-in-law, L.N. Spencer, founded the town of Yukon in 1891. Mollie Spencer was the grandmother of Oklahoma Philanthropist John Kirkpatrick and great-great grandmother to his grandson, Christian Keesee, who has owned the farm for 40 years.

“My son, Blake Keesee, and I are pleased to make this contribution to the Kirkpatrick Family Fund,” said Christian Keesee, Kirkpatrick Family Fund president. “By doing so, the property will be maintained and preserved for, not only public enjoyment during festivals and community events, but also for all variety of animals that make their home on the property as well as migratory animals who stop in at all times of the year to refresh themselves on the property’s lakes and unspoiled wooded areas.”

Enjoyed by thousands annually during festivals such as the Chisolm Trail Historical Preservation Society’s Easter on

the Prairie and the Chisolm Trail and Crawfish Festival, the Kirkpatrick Family Farm has played host to annual events for the past several decades. Located on the original Chisolm Trail, the Farm serves to educate the community on prairie living during this post-Civil War cattle drive era. Families have enjoyed participating in activities of the period, farm animals, food, dance, music and demonstrations of traditional cowboy culture, such as gunfight reenactments and blacksmithing. The annual Iron Thistle Scottish Festival at the Farm is a unique celebration of Celtic culture, complete with music, dance, food, heavy athletic competitions and sheepherding demonstrations.

Since the gift was made, the Kirkpatrick Family Farm has been incorporated as a 501(c)(3) nonprofit organization that will operate the farm for the Kirkpatrick Family Fund for the benefit of Yukon and surrounding communities.

“The Kirkpatrick Family Fund is humbled to receive this significant gift from the Kirkpatrick family,” said Liz Eickman, Kirkpatrick Family Fund director. “We look forward to continuing the tradition of these annual festivals and the preservation of this historic land. Additionally, future programming and community partnerships will be determined over the next year to provide further educational and experiential opportunities for all to enjoy.”



In Fiscal Year 2016, the Kirkpatrick Family Fund announced a \$500,000 matching gift to The Nature Conservancy for the conservation of wildlife habitat at the J.T. Nickel Family Nature and Wildlife Preserve near Tahlequah, Oklahoma, via an endowment fund at the Oklahoma City Community Foundation. The gift will help the Nature Conservancy sustain the plant and animal communities on the preserve, as well as develop the land as a demonstration site in land management best practices.

Kirkpatrick Family Fund Large and General Operating Support Grants (cont.)

Community Development

American Indian Cultural Center Foundation – \$50,000 to support the completion of the American Indian Cultural Center and Museum.

Oklahoma Center for Nonprofits Inc. – \$20,000 to support the Shared Financial Services program.

Executive Service Corps of Central Oklahoma – \$25,000 for general operating support.

Kirkpatrick Family Farm, Inc. – \$160,000 for general operating support.

Neighborhood Alliance of OKC Inc. – \$18,000 for general operating support.

Oklahoma City Economic Development Foundation – \$30,000 to support the Forward Oklahoma City IV.

OKC Housing Redevelopment Corporation – \$15,000 for general operating support.

Possibilities, Inc. – \$15,000 for general operating support.

Sallie Bush Community Building – \$13,776 to support the kitchen and building renovation.

St. Paul's Episcopal Church – \$25,000 to support the water infiltration repairs and prevention.

World Neighbors, Inc. – \$20,000 to support printing and design of publications.

Education

Community Literacy Centers – \$10,000 for general operating support.

Girl Scouts - Western Oklahoma, Inc. – \$15,000 to support camp renovations.

Oklahoma City Police Department – \$18,500 to support the Senior Management Institute for Police training.

Payne Education Center – \$15,000 for general operating support.

Positive Tomorrows Inc. – \$15,000 for general operating support.

Teach for America – \$25,000 to support the summer school and pre-service training programs.

Environment

Myriad Gardens Foundation – \$25,000 to support the Lake Terrace project.

Tree Bank – \$10,000 for general operating support.

Health

Central Oklahoma American Indian Health Council – \$18,550 to support access to family planning services.

Health Alliance for the Uninsured – \$25,000 to support the electronic medical record system-based patient communication.

Hearts For Hearing Foundation – \$25,000 to support the Give Hope capital campaign.

National Campaign to Prevent Teen and Unplanned Pregnancy – \$66,063 to support the Reducing Unplanned Pregnancy among College Students project.

Planned Parenthood of the Great Plains (Central Oklahoma) – \$200,000 to support the Teen Pregnancy Prevention marketing initiative.

St. Anthony Hospital Foundation – \$10,840 to support Art for Health.

Teen emPower! – \$30,000 to support the Postponing Sexual Involvement curriculum.

Variety Care Foundation – \$275,000 to support the Teen Pregnancy Prevention program.

Social Services

Britvil Community Food Pantry, Inc. – \$15,000 for general operating support.

Calm Waters Center for Children and Families – \$15,000 for general operating support.

Heartline, Inc. – \$20,000 for general operating support.

Metropolitan Better Living Center, Inc. – \$35,000 for general operating support.

Rebuilding Together OKC, Inc. – \$20,000 for general operating support.

Regional AIDS Intercommunity Network of Oklahoma – \$15,000 for general operating support.

Regional Food Bank of Oklahoma – \$50,000 for general operating support.

Sunbeam Family Services Inc. – \$35,000 to support Sunbeam Senior Services.

The Education and Employment Ministry, Inc. – \$25,000 for general operating support.

United Way of Central Oklahoma – \$100,000 for general operating support.

Upward Transitions – \$15,000 for general operating support.

YWCA Oklahoma City – \$15,000 for general operating support.

Kirkpatrick Family Fund Matching Endowment Grants

The Kirkpatrick Family Fund offers a \$1 match for every \$3 a nonprofit organization receives for its endowment fund at the Oklahoma City Community Foundation. To participate, the organization must apply and agree to raise their intended goal within one year. Below are the Matching Endowment Program grants approved during Fiscal Year 2016. The dollar amount listed is the Kirkpatrick Family Fund's match amount.

Animals

Central Oklahoma Humane Society \$20,000

Arts and Humanities

Allied Arts Foundation \$6,000
Harding Fine Arts Academy \$2,000
Jazz in June, Inc. \$1,500
KCSC Classical Radio Foundation \$33,000

Children, Youth and Families

Oklahoma Baptist Homes for Children \$20,000
YMCA Camp Classen \$25,000
Youth and Family Services \$15,000

Community Development

Crown Heights - Edgemere Heights
Neighborhood Association \$3,000
Putnam Heights Preservation Area \$3,500

Education

El Reno Public School Foundation \$17,000
Friends of Libraries in Oklahoma \$2,000
Friends of the Mustang Public Library \$1,000
Metro Technology Centers Foundation, Inc. \$25,500
Midwest City-Del City Public Schools Foundation \$4,000
Moore Public School Foundation, Inc. \$40,000
Oklahoma Air Force ROTC \$15,000
OKC Metro Literacy Coalition \$20,000
Oklahomans for Special Library Services \$20,000

Environment

Myriad Gardens Foundation \$33,000
The Nature Conservancy - J. T. Nickel Family Nature & Wildlife Preserve \$500,000

Health

Edmond Mobile Meals \$3,000
Health Alliance for the Uninsured \$6,000
Oklahoma AIDS Care Fund, Inc. \$15,000

Growing Philanthropy Through Investment Performance

Since 1969, the Oklahoma City Community Foundation has worked with donors to create permanent endowments to serve the charitable needs of our community. Following the vision of our founder John Kirkpatrick, we have fostered the growth of these endowment funds through the stewardship of new gifts and sound investment and distribution practices.

Investment performance has significantly contributed to the growth of the Oklahoma City Community Foundation's endowment assets. Each year, we receive new gifts from donors, and we make grants and distributions to community organizations through the endowment funds we administer.

Since 2006, the Community Foundation has received \$297 million in gifts and has granted more than \$234 million back to the community. In the same time period, the market value of our assets increased from \$485 million in 2006 to \$850 million in 2016. More than 76 percent of this growth, or \$302 million, was a result of investment performance.

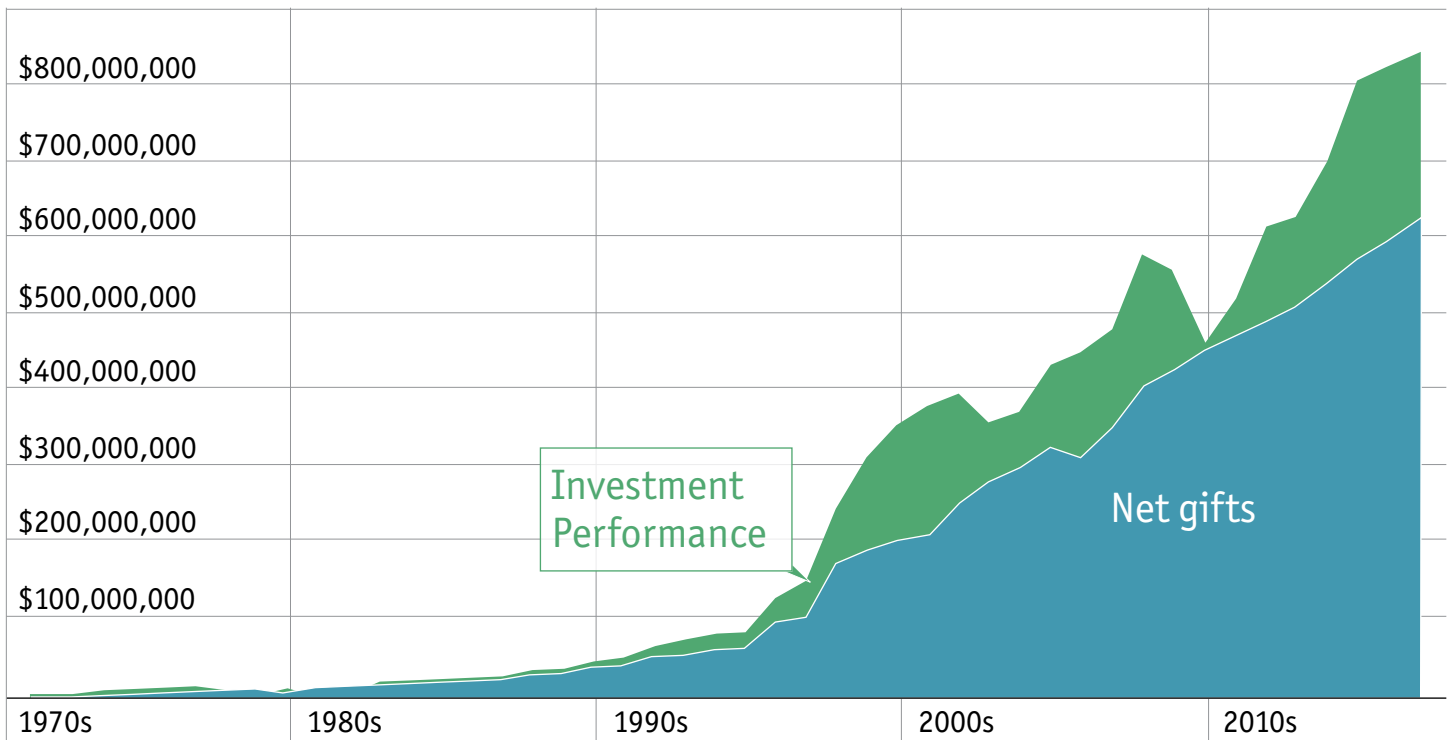
Throughout the past 10 years, the combination of gifts and investment performance has yielded an annual 7.6 percent growth rate of our endowment assets. The \$302 million in investment earnings will continue to add more than \$10 million in endowment fund distributions to the community each year. Over time, steady investment performance provides a significant impact in the community.

For example:

- More than \$444,000 in scholarships has been awarded to students formerly in Oklahoma's foster care system from an endowment established in 1997 with a \$211,000 gift from Willie Elizabeth Shipley's estate. Today, this gift is worth \$431,000 as a result of investment returns.
- Since 1996, Sunbeam Family Services has received \$153,000 in gifts to their charitable organization endowment fund. Today, these gifts are worth \$245,000 and have provided \$242,000 in distributions back to the organization.
- In 1997, Red Earth received \$101,000 in gifts to their charitable organization endowment fund. Today, the value of their endowment is \$167,000, and they have received \$182,000 in distributions from the investment return on these funds.

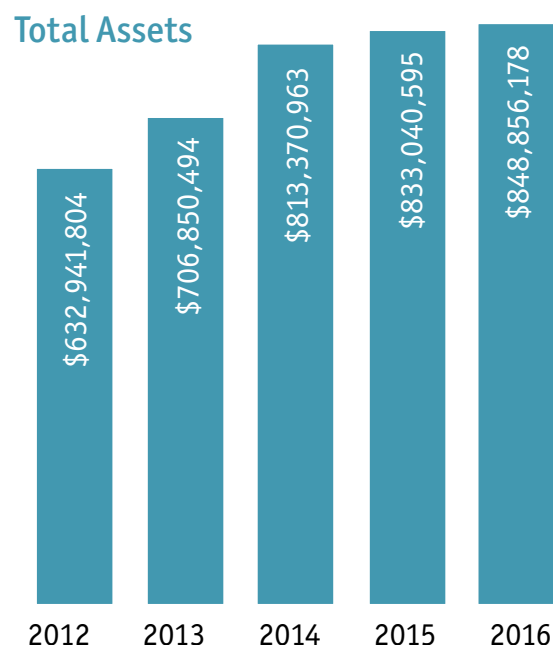
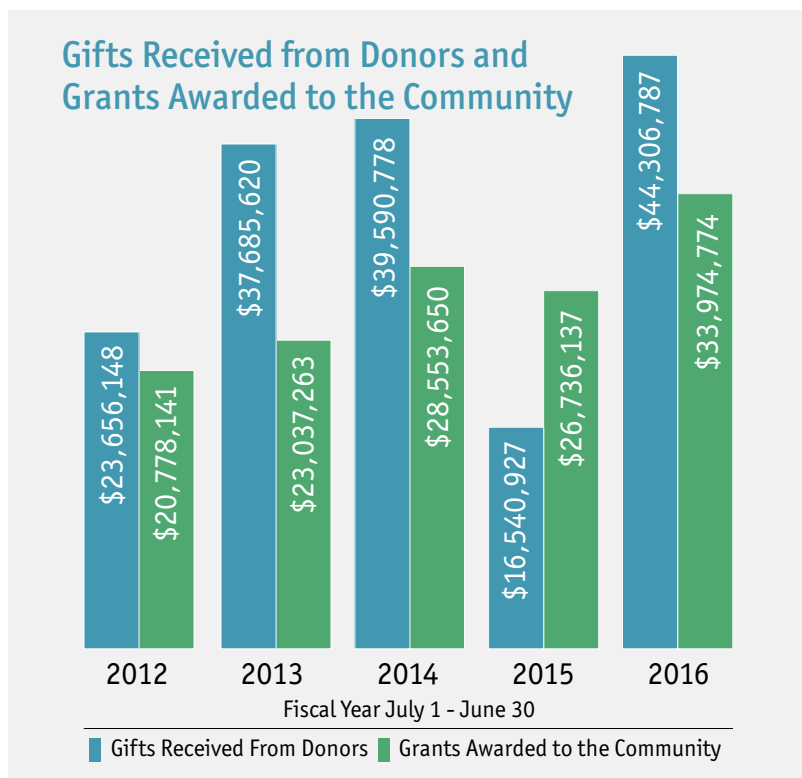
Investing our endowment assets for both security and long-term growth is just one of the many ways the Oklahoma City Community Foundation is growing philanthropy in our community. By establishing or giving to an endowment fund at the Oklahoma City Community Foundation, you can leverage investment performance to make a greater impact with your charitable gifts.

Oklahoma City Community Foundation Endowment Asset Growth 1970-2016





Five-Year Financial Highlights



Note: Gift and grant amounts include interfund gifts and grants that are excluded from audit and financial summary amounts.

Fiscal Year 2016 Investment Performance Pooled Investments as of June 30, 2016

	Fiscal Year End	Three Years	Five Years	Ten Years
EQUITIES				
Oklahoma City Community Foundation	-0.01%	9.26%	9.17%	6.46%
S&P 500	3.99%	11.66%	12.10%	7.42%
Russell 3000	2.14%	11.13%	11.60%	7.40%
MSCI ACWI ex US	-9.80%	1.62%	0.56%	2.33%
FIXED INCOME				
Oklahoma City Community Foundation	3.58%	2.64%	2.90%	4.53%
Barclays Capital Govt./Credit Intermediate A+	4.24%	2.74%	2.65%	
TOTAL RETURN				
Oklahoma City Community Foundation	1.34%	6.55%	6.61%	5.87%
50% Russell 3000/15% MSCI ACWI/35% Barclays Capital G/C Int (Note A)	1.20%	6.88%	6.97%	5.90%
65% S&P 500/35% Barclays Capital G/C Int (Note B)	4.35%	8.69%	8.98%	6.68%

NOTE A: Equity performance is compared to the Russell 3000 stock index and the MSCI ACWI ex US International equity index; fixed income performance is compared to the Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these three indices.

NOTE B: Equity performance is compared to the Standard and Poor's 500 stock index (S&P500); fixed income performance is compared to the Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these two indices.

For more information on our investment policies, visit occf.org/investmentmanagement or contact Rhonda Godwin, director of administration and investment operations, at 405/606-2916.

Investment Committee

Steven C. Agee, Chair (*as of June 30, 2016*)
Dean, Meinders School of Business

Bond Payne, Chair (*term ended June 30, 2016*)
Chairman, Heritage Trust

Mike Collison
CFO, The Oklahoma Publishing Company

Steven C. Davis
Attorney, Hartzog Conger Cason & Neville

Paul Dudman
Attorney, Fellers Snider

Kirkland Hall
Co-owner, Hall Capital

Laura Ratliff
Community Volunteer

Mo Grotjohn
The Meinders Foundation

Edward Krei
Managing Director, The Baker Group (*retired*)

J. Edward Barth, ex officio
Attorney, Andrews Davis

James H. Holloman Jr., ex officio
Attorney, Crowe & Dunlevy

Christian K. Keesee, ex officio
Chairman, Kirkpatrick Bank

Investment Managers

Large Cap Value

O'Shaughnessy Asset Management

Large Cap Core

Saratoga Research and Investment Firm

Small Cap Value

Earnest Partners, LLC

Small Cap Core

Kalmar Investments Inc.

International

Aberdeen Asset Management

Fixed Income

JP Morgan Chase Asset Management
BOK Financial

Investment Consultant

Jack Marringa
United Capital Financial Advisors, LLC

Investment Management Strategy

Since our founding in 1969, the Oklahoma City Community Foundation has been central Oklahoma's leading advocate for building endowment funds through both support from donors and sound investment and distribution strategies.

Our investment policy has four major objectives:

- Capital preservation
- Inflation protection
- Continuing source of annual distribution for charitable purposes
- Investment return in the top third of professionally managed funds

Low Administrative Expenses & Investment Costs

Our investment strategy utilizes both active managers and index funds to add value while keeping the cost low. The low cost and efficient operation of our investment management program benefits all endowment funds, large and small. For Fiscal Year 2016, our cost of investments was 30 basis points (30/100 of 1 percent) compared to more than 100 basis points charged for the average mutual fund or active equity fund manager that requires a large minimum account.

Investment Policy & Investment Committee's Role

Our investment policy is specifically designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity. Our policy's objectives are to allow the fund to generate distributions, grow to accommodate inflation and continue to exist in the future.

Responsibility for investment policy and manager selection rests with a nine-member investment committee composed of six Trustees or former Trustees and three non-Trustee Oklahoma City community leaders with strong investment expertise.

Our investment committee hires investment managers for each particular investment style. We use seven active managers; five for equities and two for fixed income investments. Approximately 47 percent of the pooled investments are actively managed.

The investment committee, along with investment counsel, United Capital Financial Advisors, LLC, determines asset allocation between equities and fixed income and remains disciplined in emphasizing diversification of assets, quality investments and a long-term perspective. As of June 30, 2016, the target percentage of the general pool invested in equities is 60.0 percent with 37.5 percent in fixed income investments and the remaining 2.5 percent in cash.

Spending Policy

Our prudent spending policy is designed to allow funds to capitalize on good investment years, as well as protect the value of the fund in low or negative return markets. The majority of permanent endowment funds we administer receive annual distributions of 5 percent of the fund's average market value for the previous 12 quarters as of March 31. The remaining investment return adds value to the corpus of the fund, protecting from inflation and creating a more predictable and stable annual distribution.

For more information on investment and spending policies, please contact Rhonda Godwin, director of administration and investment operations, at 405/606-2916 or visit occf.org/investmentmanagement.

Fiscal Year 2016 Financials



CONSOLIDATED STATEMENTS OF FINANCIAL POSITION OKLAHOMA CITY COMMUNITY FOUNDATION, INC.

	June 30	
	2016	2015
ASSETS		
Cash	\$ 3,656,396	\$ 4,997,547
Accrued income	581,476	714,318
Investments:		
Cash equivalent funds and securities	793,158,119	780,366,087
Real estate, limited partnerships and other	40,429,882	37,940,513
Contributions receivable and beneficial interest in lead trust	1,578,775	1,793,764
Property and equipment	4,455,002	4,627,584
Other assets	<u>4,996,528</u>	<u>2,600,782</u>
TOTAL ASSETS	<u>\$ 848,856,178</u>	<u>\$ 833,040,595</u>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Grants and program services payable	\$ 7,925,636	\$ 6,374,380
Annuity contracts payable	2,994,845	2,998,420
Other liabilities	3,218,707	1,883,968
Charitable funds held for the benefit of other organizations	<u>91,725,909</u>	<u>97,908,700</u>
TOTAL LIABILITIES	105,865,097	109,165,468
NET ASSETS		
Unrestricted	186,797,350	163,116,860
Temporarily restricted	<u>556,193,731</u>	<u>560,758,267</u>
TOTAL NET ASSETS	<u>742,991,081</u>	<u>723,875,127</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 848,856,178</u>	<u>\$ 833,040,595</u>

CONSOLIDATED STATEMENTS OF ACTIVITIES OKLAHOMA CITY COMMUNITY FOUNDATION, INC.

	Year Ended June 30, 2016			Year Ended June 30, 2015		
	Unrestricted	Temporarily Restricted	Total	Unrestricted	Temporarily Restricted	Total
REVENUES AND SUPPORT						
Contributions	\$ 31,935,544	\$ 9,386,663	\$ 41,322,207	\$ 8,531,242	\$ 2,695,779	\$ 11,227,021
Investment income	2,370,413	9,167,524	11,537,937	2,444,859	10,307,730	12,752,589
Net investment gains (losses)	(184,675)	2,437,712	2,253,037	3,335,993	18,330,208	21,666,201
Change in value of split-interest agreements	(272,193)	25,747	(246,446)	(123,129)	57,427	(65,702)
Administrative fees and other income	2,432,915	(2,023,947)	408,968	2,361,223	(1,954,136)	407,087
Net assets released from restrictions	<u>23,558,235</u>	<u>(23,558,235)</u>	<u>-</u>	<u>26,333,098</u>	<u>(26,333,098)</u>	<u>-</u>
TOTAL REVENUES AND SUPPORT	59,840,239	(4,564,536)	55,275,703	42,883,286	3,103,910	45,987,196
EXPENSES AND DISTRIBUTIONS						
Grants and program services	28,699,746	-	28,699,746	23,192,215	-	23,192,215
Investment expenses and management fees	3,380,316	-	3,380,316	3,247,287	-	3,247,287
General and administrative	3,284,860	-	3,284,860	2,833,206	-	2,833,206
Development	<u>794,827</u>	<u>-</u>	<u>794,827</u>	<u>570,807</u>	<u>-</u>	<u>570,807</u>
TOTAL EXPENSES AND DISTRIBUTIONS	<u>36,159,749</u>	<u>-</u>	<u>36,159,749</u>	<u>29,843,515</u>	<u>-</u>	<u>29,843,515</u>
CHANGE IN NET ASSETS	23,680,490	(4,564,536)	19,115,954	13,039,771	3,103,910	16,143,681
NET ASSETS AT BEGINNING OF YEAR	<u>163,116,860</u>	<u>560,758,267</u>	<u>723,875,127</u>	<u>150,077,089</u>	<u>557,654,357</u>	<u>707,731,446</u>
NET ASSETS AT END OF YEAR	<u>\$ 186,797,350</u>	<u>\$ 556,193,731</u>	<u>\$ 742,991,081</u>	<u>\$ 163,116,860</u>	<u>\$ 560,758,267</u>	<u>\$ 723,875,127</u>

Our annual independent audit report and the related audited consolidated financial statements with footnotes will be available on our website, www.occf.org, after Nov. 30, 2016.

Fiscal Year 2016 Committees



The individuals listed below volunteer their time and expertise to serve on the following committees. Each committee is chaired by a current Trustee.

Audit Committee

Provides oversight on annual audit process.

Scott Spradling, <i>Chair</i>	Harry Merson
Bob Dilg	Bob Slovacek
Eddie Ditzler	J. Eugene Torbett

Charitable Organization Endowment Program Committee

Provides guidance and oversight for the Charitable Organization Endowment Program and GiveSmartOKC.org.

Steven C. Agee, <i>Chair</i>	Oscar Jackson
Tina Burdett	Ann Johnstone
Brenda Granger	Paul Moore
Mo Grotjohn	

Executive Committee

Provides administrative and management oversight. All committee members served as Trustees during Fiscal Year 2016.

Tony Tyler, *Chair (through June 30, 2016)*
Bond Payne, *Chair (as of July 1, 2016)*

Steven C. Agee	Leslie Hudson
Steven C. Davis	Oscar Jackson

iFund Grants Review Committee

Reviews and provides input on iFund grant programs.

Leigh Ann Albers	Shirley Cox
Kelley Barnes	David Gorham
Mary Ann Bauman, M.D.	Tony Tyler
Ray Bitsche	

Investment Committee

Oversees investment management and selects investment managers.
See page 60.

Margaret Annis Boys Trust/Parks & Public Space Initiative

Reviews and provides input on public parks and beautification projects.

Leslie Hudson, <i>Chair</i>	P.B. Odom III
Steven C. Agee	Bond Payne
Sam Bowman	Georgie Rasco
Kurt Foreman	Pat Ryan
Bill Gumerson	Jane Sutter
Vicki Howard	Pete White
Elaine Lyons	Renate Wiggin
Rodd Moesel	

Trustee Scholarship Initiative Committee

Provides oversight for the Trustee Scholarship Initiative programs.

Oscar Jackson, <i>Chair</i>	Anita May
Nancy Coats-Ashley	Diane Ming
Nolan Coyle	D.J. Morgan
Linda Keefe	Elaine Schuster
Jessica Martinez-Brooks	

Wellness Initiative Committee

Provides oversight on program and grant requests.

Mary Ann Bauman, M.D., <i>Chair</i>	Tim Pederson
Mike Grady	Steve Petty
Mike Knopp	Alicia Salvatore
Jonas Mata	Ashley Weedn

Trustees



The Oklahoma City Community Foundation 15-member Board of Trustees is comprised of local civic and business leaders who volunteer their time to help govern our policies, administration, activities and grant decisions. In accordance with our bylaws, six Trustees are nominated by outside groups and nine are appointed by the current Trustees. The Trustees are nominated for three-year terms and can serve up to nine consecutive years.



Bond Payne,
Chairman (As of July 1, 2016)
Chairman, Heritage Trust
Company
Appointed by the Trustees



T. Scott Spradling,
Treasurer
Attorney, Spradling,
Kennedy, McPhail
Appointed by the Trustees



Steven C. Agee, Ph.D.
Dean, Meinders School
of Business,
Oklahoma City University
*Nominated by the
Oklahoma City Mayor
and City Council*



Mary Ann Bauman, M.D.
Medical Director, Women's
Health and Community
Relations,
INTEGRIS Health
Appointed by the Trustees



Mike Collison
Vice President & CFO,
The Oklahoma Publishing
Company
Appointed by the Trustees



Steven C. Davis
Attorney, Hartzog Conger
Cason & Neville
*Nominated by the
Investment Committee*



Mark W. Funke
CEO & President,
Southwest Bancorp.
*Nominated by the United
Way of Central Oklahoma*



Leslie Hudson
Community Volunteer
Appointed by the Trustees



Oscar Jackson
Secretary of
Human Resources &
Administration, State of
Oklahoma (retired)
Appointed by the Trustees



Ann Johnstone
Community Volunteer
Nominated by Allied Arts



Jenny Love Meyer
Love's Travel Stops
& Country Stores
*Appointed by the
Trustees*



Vicki Miles-LaGrange
U.S. District Judge,
Western District of
Oklahoma
*Nominated by the U.S.
Chief Judge, Western
District of Oklahoma*



P.B. Odom III
P.B. Odom III Land
Development Companies
Appointed by the Trustees



David E. Rainbolt
CEO & President,
BancFirst Corp.
*Nominated by the Greater
Oklahoma City Chamber*



Tony Tyler
(Chairman through
June 30, 2016)
Tyler Media
Appointed by the Trustees



Christian Keesee
Chairman, Kirkpatrick
Bank
ex officio



Nancy B. Anthony
President



Rhonda Godwin
Director, Administration
& Investments
Secretary



Cathy Lippard
Controller
Assistant Treasurer

Staff



The Oklahoma City Community Foundation staff oversees the day-to-day operations of the organization. Our offices are open Monday through Friday, 8:30 a.m. to 5:00 p.m. You can contact the staff directly at the telephone number listed below their photographs or email them using first.initial.last.name@occf.org.



Ashlee Adams
Coordinator,
GiveSmartOKC
405/606-2918



Megan Hornbeek Allen
Coordinator,
Scholarship Funds
405/606-2917



Nancy B. Anthony
President
405/606-2900



Kelley Barnes
Manager,
Development and
Donor Services
405/606-2942



James Bonds
Administrative
Accountant
405/606-2906



Tina Burdett
Grants and Programs
Administrator,
Kirkpatrick Family
Fund
405/767-3702



Neil Cambre
Graphic Designer
& Web Manager
405/606-2923



Joe Carter
Director,
Development
405/606-2914



Kenneth Conklin
Development and
Donor Services
405/606-2926



Teresa Rose Crook
Director, Community
Programs
405/606-2929



Brian Dougherty
Margaret Annis Boys
Trust Program Officer
405/606-2908



Liz Eickman
Director, Kirkpatrick
Family Fund
405/767-3702



Madison Ennenga
Grants Assistant,
Kirkpatrick Family
Fund
405/767-3702



Gayle Farley
Director, Charitable
Organization
Endowment
Program
405/606-2910



Rick Fernandez
Coordinator,
Counselor Network &
Scholarship Program
405/606-2919



Kasey Gardner
Communications &
Publications Manager
405/606-2922



Rhonda Godwin
Director,
Administration
& Investments
405/606-2916



Donna Harless
Accounting Support
405/606-2925



Carol Hopper
Accounting,
Compliance &
HR Benefits
405/606-2903



Shree Ledford
Grants & Program
Support
405/606-2950



Cathy Lippard
Controller
405/606-2915



Sara Maynard
Programs Manager,
Kirkpatrick
Family Fund
405/767-3702



Wanda Minter
Coordinator,
Scholarship
Administration
405/606-2907



June Owens
Accounting Services
405/606-2937



Sarah Pool
Office Manager
405/606-2905



Sally Ray
Parks & Wellness
Initiative Program
Officer
405/606-2930



Anna-Faye Rose
Program Services
405/606-2902



Bill Schmid
Facility Maintenance
405/606-2931



Joel Schwarz
Director, Information
Technology
405/606-2901



Andrew Shepard
Development
Associate
405/606-2927



Jana Steelman
Director,
Communications
405/606-2941



Jennifer Stewart
Director,
Donor Services
405/606-2912



Helen Stout
Assistant Controller
405/606-2921



Erika Warren
Manager, Grants &
Programs
405/606-2920



Joni Younts
Receptionist
405/606-2947



Patricia Zeiler
Accountant
405/606-2924




Visit Our Office


We are located in historic Automobile Alley in downtown Oklahoma City on the southeast corner of North 10th Street and North Broadway Avenue. Office hours are 8:30 a.m.-5 p.m., Monday-Friday.


Contact Us

We can help answer your charitable giving questions at 405/235-5603 or info@occf.org.

 www.occf.org

 [@occforg](https://twitter.com/occforg)

 youtube.com/occforg

 givesmartokc.org

 [Facebook.com/occf.org](https://facebook.com/occf.org)



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COMMUNITY FOUNDATION

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