



OKLAHOMA CITY COMMUNITY FOUNDATION

2018 Annual Report

your  
community | foundation



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## Dear Friends,

In 1969, John E. Kirkpatrick embarked on a journey to create a foundation for the community that would inspire others to give to charity. Nearly 50 years later, the Oklahoma City Community Foundation has grown to be an enduring resource for our community — a place where people can come together to make a difference, to make arts and culture flourish, to improve the well-being of our residents, to provide opportunities for those less fortunate and to create hope for the future.

Thanks to you, the Oklahoma City Community Foundation celebrated a number of milestones during Fiscal Year 2018. For the first time in the organization's history, our total assets exceeded \$1 billion. We made 4,700 grants to 1,500 different charities and programs, for a total impact of \$36 million in the community. We awarded scholarships to help more than 700 students further their education. We also expanded our building by 15,000 square feet, adding more meeting space for community organizations and office space for our growing staff.

Beginning July 1, 2018, we introduced two new investment pool options to donors with advised or affiliated fund balances of \$250,000 or more. Eligible donors may choose from a 100 percent equity pool and a moderate growth pool, both with greater equity exposure than our general investment pool. We are pleased to provide these additional options to enable donors with varying levels of risk tolerance to align their investments with their philanthropic goals.

For 49 years, one driving force has helped make our work possible. **You**. The 2018 Annual Report is dedicated to your generosity, your passion and your commitment to strengthening our community.

In these pages, you'll read stories of people just like you, who have joined together to make a greater impact in our community. In **Your Community**.

Thank you for joining us on this journey.

*Steven C. Agee, Chair*

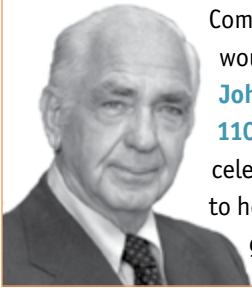
*Nancy B. Anthony, President*



Photo by Brandon Snider.

# Looking Back

During Fiscal Year 2018, we...



Commemorated what would have been **John E. Kirkpatrick's 110<sup>th</sup> Birthday** with a celebration luncheon to honor his legacy of generosity.

Were awarded **Keep Oklahoma Beautiful's Towering Spirit Award** for the work of our Margaret Annis Boys Trust and Parks & Public Space Initiative in enhancing our community's parks, medians, school grounds and neighborhoods.



Helped **4,400 students apply for scholarships** through a new, online instructional video. We awarded **\$2.5 million in scholarships to more than 700 students!**

Convened community partners to participate in a **Community Needs Assessment** to identify critical health and human service issues, as well as resources available in central Oklahoma. In the upcoming year, we will share the final report to help increase understanding of our community needs, as well as the actions needed to strategically address these issues.



**Awarded \$65,400 to 57 central Oklahoma mobile meal providers**, helping them prepare and deliver warm meals to homebound elderly citizens.

Provided **free education and training opportunities** to:

- **900 professional advisors** including attorneys, CPAs, financial planners and trust officers on charitable giving.
- **130 nonprofit staff** on planned giving strategies to help them grow their endowment funds.
- **54 central Oklahoma high school guidance counselors** on college admissions and financial aid resources.
- **80 groundskeepers and volunteers** who maintain school campuses, parks, libraries, nonprofit properties, neighborhood greenbelts and other public spaces on landscaping best practices and maintenance tips.



Helped establish the **Greater Oklahoma City Parks & Trails Foundation**, a 501(c)(3) public charity designed to be a leading advocate for parks, trails and public spaces in central Oklahoma. Led by Marsha Funk, the foundation will launch a number of projects in the upcoming year including a comprehensive trail map for visitors and residents.



Collaborated with the Central Oklahoma Wellness Alliance to present **Ready, Set, Grow**, a series of free community workshops on how to grow fruits and vegetables at home to incorporate fresh produce in your diet.



Opened our **15,000-square-foot building addition** with six new meeting rooms and 18 staff workspaces. Learn more about the meeting space available for community organizations at [occf.org](http://occf.org).



Reached **total assets of \$1.06 billion.**

# Moving Forward

Since 1969, the Oklahoma City Community Foundation has been connecting generous donors with causes and charities they care about to make a difference in our community. As we look toward our 50<sup>th</sup> anniversary in 2019, we are excited to celebrate the donors, charitable organizations, professional advisors and community with whom we work to make a collective impact for good.



We hope you will join us in celebrating our community throughout 2019!



Through March 2019

### Visit Erwin Redl: *Whiteout* at Campbell Art Park

We are pleased to join Oklahoma Contemporary as the presenting sponsor of Erwin Redl: *Whiteout* at Campbell Art Park. Originally commissioned by Madison Square Park Conservancy in New York City, the outdoor art installation will visit Oklahoma City's Campbell Art Park at Northwest 11th Street and Broadway Avenue along historic Automobile Alley, October 2018 to March 2019.

January 2019

### Celebrate The Great Idea Challenge Grant Recipients

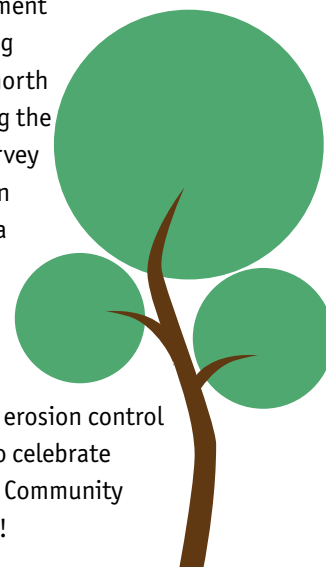
Launched in April 2018, The Great Idea Challenge was designed to inspire innovative projects that will impact our community throughout the next 50 years. Through a competitive grant process, we received 89 proposals and invited 21 to apply for The Great Idea Challenge. In 2019, we will announce the successful grant recipients, awarding up to \$1 million in grants for exciting new programs for our community!



March 2019

### Walk Along the Oklahoma City Community Foundation River Trail

We have joined together with the City of Oklahoma City and the Oklahoma City Riverfront Redevelopment Authority to plan a major landscaping project along the Oklahoma River's north shore. We will plant 1,000 trees along the cycling and pedestrian trail from Harvey to Portland avenues, transforming an empty stretch of treeless space into a linear park full of shade, color and scenery. Additional enhancements will include native grasses and wildflowers to create managed, natural areas that are complete with erosion control and seating along the way. Join us to celebrate the completion of the Oklahoma City Community Foundation River Trail in March 2019!



June 2019

### Professional Advisors Learn about Charitable Planning

Professional advisors are invited to learn how to help their clients with charitable planning, while also helping them meet their estate planning and wealth management goals at a one-day seminar featuring nationally recognized philanthropic experts.



October 2019

Stay Tuned for an Exciting Public Art Announcement!

Throughout 2019

### Learn About the History of Philanthropy in Central Oklahoma

In 2019, we will launch an online archive to showcase the history of the Oklahoma City Community Foundation and the generous donors who we have helped make an impact in the community throughout the last 50 years.

Stay up-to-date on the latest 50<sup>th</sup> Anniversary activities at [occf.org](http://occf.org).



### BEALE DEFEATS OVERHOLSER FOR MAYOR

OKLAHOMA CITY  
NOVEMBER 27, 1889



With a margin of only 34 votes, Beale claimed a mandate to overturn seven months of Seminole-dominated city rule. Within a month the city was in chaos and city governance was shut down by federal authorities.

Dr. A. J. Beale, the leader of the Oklahoma faction, was nominated as mayor. Beale's victory after his resignation on November 16, the Seminole faction, knowing how Beale they had lost the charter election in the August, were wary of nominating one of their own. Instead they passed Henry Overholser, the chairman of the Board of Trade and a businessman aligned with outside forces, to run against Beale. He won by a narrow margin on November 27, and Beale won by 34 votes.

Facing a hostile Seminole city council, the new Oklahoma mayor announced his intention to declare his second term vacant and to call an election for December 30. He also stated his opposition to recognizing the rights of Beale's faction for certification and announced a plan to file a suit at the Land Office that would conflict with the Executive Order on one hand and the Board of Trade on the other. He also ordered all public property owners to begin appearing to federal authorities for help. On December 30, six Seminole leaders in Wichita called off the election and ordered an end to any further claims against existing property owners.



A. J. Beale was nominated as mayor of Oklahoma City after his resignation on November 16, 1889.

Henry Overholser was nominated as mayor of Oklahoma City after his resignation on November 16, 1889.



Henry Overholser was nominated as mayor of Oklahoma City after his resignation on November 16, 1889.

January 20, 1890  
Mr. A. J. Beale  
Oklahoma City  
Dear Mr. Beale:  
I have just received your letter of the 17th inst. and in reply to inform you that the Board of Trade has no objection to your nomination as mayor of Oklahoma City. I am, however, sorry to hear that you are unable to get the Board of Trade to certify you as mayor. I am sure that you will be able to get the Board of Trade to certify you as mayor if you will only give them a chance to do so.

A handwritten letter from the Board of Trade to A. J. Beale, dated January 20, 1890.



Chuck Wiggin stands in front of City Hall, the site of four of the 28 historical markers that make up The '89er Trail.



## Bringing History to Life

When Chuck Wiggin moved to Oklahoma City in 1978, he was captivated by the story of the city's birth. A commercial real estate developer by trade and history enthusiast at heart, he quickly connected photos documenting the 1889 Land Run to their actual locations throughout downtown Oklahoma City.

"The greatest story of Oklahoma City is how it started in a day as a race for free land," Chuck said. "When I realized there was scarcely any evidence of that on the ground, I knew this was a story that needed to be told."

Chuck enlisted the help of historian Michael J. Hightower and Oklahoma Historical Society director Bob Blackburn to bring the early history of Oklahoma City to life through the creation of The '89er Trail. The series of historical markers leads visitors on a walk through history, featuring 28 historically significant sites in the heart of downtown.

As the sole funder of the project, Chuck established a fund at the Oklahoma City Community Foundation to help with the administrative details.

"The Community Foundation was the perfect choice," he said. "I established this fund not only to help build the trail, but to ensure it continues to tell the story of our heritage for years to come."



your legacy



*The Oklahoma City Community Foundation has been helping donors create lasting legacies for our community since 1969. We help individuals, families and organizations make a greater impact with their charitable gifts, connecting them with community needs and offering giving solutions to ensure they get the most out of their philanthropy.*

## Why Give Through the Oklahoma City Community Foundation?

### Local Expertise

Our professional staff offers in-depth knowledge of the issues, opportunities and resources that shape our community. We work closely with nonprofits in all areas of community need, including social services, education, health care, arts and the environment. We can help connect you with local organizations and learn more about the programs that make a difference in areas you care about most.

### Flexible Giving Options

We make giving simple and effective. Whether you want to make a gift today to our various charitable funds or you want to create a lasting legacy and establish an endowment, we can help you create a giving plan that meets your needs. From the immediate tax benefits of donor advised funds, to the long-term support of affiliated funds, we offer a variety of philanthropic options. Compared to commercial gift funds, our donor services team offers more personalized service to help you achieve your individual charitable goals.

FY2018

More than  
**1,200 donors**

made **\$39.7 million**  
in charitable gifts

and established  
**76 new funds**

occf.org

# Special Donors

*These individuals, families and businesses 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 their 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

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

## Paul Benson | 2018

Lifelong resident of Okemah, Oklahoma, Paul Benson left a gift in his estate to support animal welfare and the Okemah Public Library.

## Annie & Isaac Bloom Educational Scholarship | 2001

Esther Bloom was a generous yet anonymous supporter of Emanuel Synagogue. A gift from her estate created an endowment named in honor of her parents to support education of the congregation's children.

## Margaret Annis Boys | 1991

Longtime Oklahoma City schoolteacher Margaret Annis Boys left a \$1.5 million gift from her estate to create the Margaret Annis Boys Trust that supports beautification projects in public parks, medians and school grounds in Oklahoma County.

## 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 | 2009

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

## Nola Casey | 2017

Retired schoolteacher and former Marine Nola Casey left a gift through her estate to create a scholarship for students graduating from Mason High School in Okfuskee County.

## B.C. Clark Family Fund | 1992

In celebration of the 100th anniversary of B.C. Clark Jewelers, the family established an advised fund that supports a number of charities.

## Tom Criswell | 2016

Businessman and owner of Criswell Funeral Home in Ada, Oklahoma, Tom established the Ada Community Foundation Fund to support charitable causes in the area.

## W.H. Crocus Fund | 1998

Inspired by the relationship between a guide dog and its owner, an anonymous donor established this endowment to support the training and availability of guide dogs for the visually impaired. The first grant supported the training costs of one dog, Crocus, who was named for the fund.

## Dortha Dever | 2007

Businesswoman Dortha Dever first established a scholarship to support female students pursuing a business degree at Oklahoma City University. Following her death in 2015, a gift from her trust increased the awards and created an advised fund to support various charitable causes.

## Emanuel Synagogue | 2003

Founded in Oklahoma City in 1904, Congregation Emanuel is 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

Dr. and Mrs. Frierson were longtime residents of Oklahoma City. The fund was established by the Frierson Educational Trust and provides scholarships through our Trustee Scholarship Initiative to students attending an Oklahoma college.

## Edward King Gaylord Scholarship Fund | 1970

Founder of the Oklahoma Publishing Company, E.K. Gaylord established the first scholarship endowment at the Oklahoma City Community Foundation. The fund supports scholarships awarded through our Trustee Scholarship Initiative.

## Norbert Gordon | 2014

Oklahoma City real estate investor Norbert Gordon left a gift in his estate to create an advised fund to support a number of his charitable interests.

## 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

A longtime newspaper publisher from Chelsea, Oklahoma, Robert A. Herring left a gift in his estate to establish an endowment to support medical research related to Parkinson's disease and genetic disorders.

## G. Ed Hudgins Family Fund | 1989

A founding partner of Oklahoma City architectural and engineering firm HTB, Inc., Mr. Hudgins established the fund to support a scholarship at the Oklahoma State University College of Engineering, Architecture and Technology as well as other charitable interests.

## 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. Gifts from Mr. and Mrs. Johnson's estate 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

Oklahoma City oilman and philanthropist John Kirkpatrick and wife, Eleanor, founded the Oklahoma City Community Foundation in 1969 to provide opportunities for donors to support charitable causes and organizations through endowment. The Kirkpatricks generously supported countless endowments for charitable organizations through their challenge match program that continues today through the Kirkpatrick Family Fund, an affiliated fund of the Oklahoma City Community Foundation.

### Lawton Retail Merchants Association | 1999

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 | 1996

Longtime Oklahoma City insurance agent Ed Leslie and wife, Norma, left a gift in their estate to establish the fund to support the charitable interests they shared during their 62-year marriage.

### McGee Foundation Fund | 2001

One of nine original Trustees of the Oklahoma City Community Foundation, Dean A. McGee established the McGee Foundation in 1963. After his death, the foundation created a fund to support scholarships through our Trustee Scholarship Initiative.

### 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.

### William Ralph Meador and Lillian Frances Watts Meador | 1996

Oklahoma City native Ralph Meador left a gift in his estate to support the Lillian Frances Watts Meador Fund, which he established to support public beautification efforts in honor of his mother.

### Milton & Mary Meier Fund | 1993

Established by a gift 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. Additional funds honor the following family members: David Felix McKean, Felix Christopher McKean, Alice and Karl Meier, Christina Moore McKean and Mary and Christopher Moore.

### Herman & LaDonna Meinders | 1999

Founder of international floral wire service American Floral Services, Herman Meinders and his wife, LaDonna, have contributed to a number of charitable funds in addition to establishing endowments that support the Oklahoma History Center, Myriad Botanical Gardens and scholarships for students at the Meinders School of Business at Oklahoma City University.

### Ruth Mershon Fund | 2001

Longtime Oklahoma City physician Dr. Ruth Mershon established the endowment through a gift of retirement funds and other assets in her will. The fund supports scholarships awarded through our Trustee Scholarship Initiative and other charitable purposes.

### Paul M. Milburn Foundation | 2005

A longtime businessman in Shawnee, Mr. Milburn transferred the assets of his private foundation to establish an advised fund to support his charitable interests including a variety of local nonprofits, school initiatives and sustainable agriculture. After his death in 2016, additional gifts from his estate further funded his charitable interests.

### Dr. Gary M. Moore Fund | 1998

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

### Donna Nigh Foundation | 1996

In 1985, friends of Donna Nigh formed the foundation in recognition of her work on behalf of Oklahoma's citizens with developmental disabilities. Mrs. Nigh transferred the foundation to the Oklahoma City Community Foundation to continue supporting grants for Oklahomans with disabilities.

### Carolyn Nuckolls | 1997

Longtime member of the Ladies Music Club, Carolyn Nuckolls left a gift in her will to support the organization's endowment to expand musical outreach to schools and the community.

### Oklahoma City Jewish Community Foundation | 1999

Several funds were transferred by the Oklahoma City Jewish Community Foundation to 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	Karchmer Charitable Trust Fund
Michael & Anita Barlow Family Fund	Marsha Segell Karchmer LOJE Fund
Sherry K. Barton Family Fund	Majir & Manya Kornblit and Michael & Joan Korenblit Holocaust Fund
Jerry B. & Jacqueline Leibs Bendorf Fund	Harry & Hedra Merson Family Fund
Sharon F. & James Ike Bennett Fund	Jack & Johanna Price Fund
Robin & Rick Black Family Fund	Edie Roodman Fund
Lori & Jeff Blumenthal Fund	Schneider Family Fund
Morris Butkin Fund	Shanker Family Fund
Charles Caylen Holocaust Memorial Fund	Shanker Frank Israel Friendship Fund
COMMUNITY Partnership Fund	Ben Shanker Family Scholarship Fund
Lawrence H. & Ronna C. Davis Family Fund	Janice & Joe L. Singer Family Fund
Dor L'Dor Fund	Joe B. & Ann G. Singer Fund
Richard H. & Adeline Fleischaker Fund	Charles & Nikki Singer Fund
Founders Fund	Joe L. Singer Memorial Fund
Justin & Linda Gardner Fund	Noam Stillman Prize Fund
Sylvia & Jack Golsen Family Fund	Glenna & Richard Tanenbaum Fund
Robert & Virginia Greenberg Fund	Mary & Larry Trachtenberg Fund
Holocaust Education Fund	Marvin & Martha Weiss Fund
Israel Fund	Robert & Tammy Weiss Family Fund
Carrie Jacobi Fund	

### Clarence E. Page Fund | 1987

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

### William T. Payne Fund | 1976

A successful Oklahoma City oil man, Mr. Payne gifted his company Payne Petroleum through his will to establish the endowment. The Payne family continues to support charitable causes he cared about through the fund.

### F.M. & Thelma Petree Fund | 1977

Founder of Liberty Mortgage and a past Oklahoma City Community Foundation Trustee, Mr. Petree generously supported endowments for Oklahoma City University and other charitable organizations.

### Ralph Pickle | 2017

Longtime member of the Church of Christ in Cleveland, Oklahoma, Ralph Pickle left a gift in his estate to establish an endowment to support the Westview Boys Home in Hollis.

### Winona S. Presley Fund | 1999

Former schoolteacher Winona Shingleton Presley's love of education motivated her to establish an endowment through her estate to support scholarships through our Trustee Scholarship Initiative.

### 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 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 started the first commercial bank in Shawnee. Ross helped to establish the Midland Group, now headed by his son-in-law, George J. Records. Contributions support Casady School and other education and scholarship funds.

### G. Jeffrey Records Jr. | 2003

Fourth-generation banker G. Jeffrey Records supports a number of charitable organizations including Casady School, Heritage Hall and YMCA Camp Classen.

### Bert R. Reed Jr. Fund | 1998

Established by Oklahoma City attorney and businessman Bert Reed Jr., the fund supports various charitable organizations including The Education and Employment Ministry (TEEM).

### A. Tom F. & Gladys Seale Fund | 1986

Kerr-McGee engineer Tom Seale and wife, Gladys, established the fund to support several youth-serving organizations. Gifts from their estate ensure the fund will continue to support these organizations, as well as St. Anthony Hospital's cardiac care unit.

### Willie Elizabeth Shipley Scholarship Fund | 1981

Established by longtime secretary for the Oklahoma State Senate, the fund provides scholarships for foster care students through the Oklahoma Youth With Promise program.

### Scott & Geneva Smith Fund | 2000

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 gift from Miss Steward's estate to serve the basic welfare and health needs of Oklahoma City residents.

### Walter Stiller Fund | 2002

An Oklahoma City native and retired treasurer of Macklanburg-Duncan, Walter Stiller designated a gift in his trust to create the fund to support the Fund for Oklahoma City.

### 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

A longtime Oklahoma City banker, Mr. Utterback left a gift in his will that supports the Fund for Oklahoma City.

### Charles E. & Renate W. Wiggin | 1998

Commercial real estate developer Chuck Wiggin and wife, Renate, support a number of charitable organizations including the Oklahoma City Philharmonic. They also established a fund to finance the creation of The 89er Trail, a series of historical markers through downtown Oklahoma City that share the story of Oklahoma City's birth.

### Brett & Kelly Wimberley | 2012

Norman residents Brett and Kelly Wimberley established an advised fund to support a variety of charitable causes important to their family.

### Pendleton & Robin Woods | 1986

Pen and Robin Woods supported a number of charitable organization endowment funds including Oklahoma Christian University, Epilepsy Association of Oklahoma and Boy Scouts of America. A World War II prisoner of war, Pen also established an endowment to maintain Oklahoma's Medal of Honor grove in Valley Forge, Pennsylvania.

### R.A. Young Foundation Fund | 1970

Founder of Oklahoma-based retail chain TG&Y, Mr. Young left a gift through his estate to transfer a portion of his private foundation to support a number of charitable organizations.

# Family Affiliated Funds

*Established with a minimum gift of \$1 million, a Family Affiliated Fund is a convenient alternative to a private foundation, offering fewer restrictions and administrative responsibilities, as well as favorable tax treatment. 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

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 charitable causes important to their family including organizations with a focus on helping at-risk 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

Created with proceeds from the sale of family-owned William E. Davis and Sons food distribution company, the William E. & Margaret H. Davis Family Affiliated Fund was the first affiliated fund at the Oklahoma City Community Foundation. Through the fund, the Davis siblings continue to support causes that are important to the family.

## Everett Family Affiliated Fund | 1993

In 1993, Dr. Mark Allen 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 organizations and universities. Although Dr. Everett died in 2006, his charitable legacy continues to support his motto of "having fun doing good."

## Robert & Blanche Gordon Family Affiliated Fund | 1993

Robert and Blanche Gordon moved to Oklahoma City in 1950 with the Ashland Oil Co., where he worked until 1976. Through the fund, their children, Holly Elliott and Peggy Duncan, continue to support charities in which the family has a long-term interest.

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

One of the first employees of Kirkpatrick Oil Company, Raymond Hefner and his wife, Bonnie, formed Bonray Oil Company in 1957. Raymond also served as a Trustee and Treasurer of the Oklahoma City Community Foundation. Prior to his 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 supports a wide variety of projects including animal rescue organizations, educational institutions, the Oklahoma City Philharmonic and the Oklahoma City Zoological Society.

## Christian Keesee Charitable Trust 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

Miriam Freedman transferred five trusts established by her stepfather and mother, Phil and Roberta Kirschner, to carry on her family's charitable legacy. Grants from the fund support charitable causes important to the family including Muskogee-area nonprofits, Jewish education programs and opportunities for foster children.

## 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 460 locations in 41 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

Ed and Mary Malzahn, founders of Ditch Witch, a global equipment manufacturer based in Perry, Oklahoma, established the fund in 1992 to benefit their community. Through their fund, the family continues its tradition of generosity and civic responsibility.

## Janice & Joe L. Singer Family Affiliated Fund | 2004

Co-founder of Singer Brothers Oil Company, Joe Singer and his wife, Janice, were active with the Emanuel Synagogue and 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

Originally from Ada, Oklahoma, Marguerite Vogt played basketball for the legendary coach Bertha Teague at Byng High School. An Okarche native, Justin Vogt graduated from the University of Oklahoma. The couple were married for 55 years. Through the fund, the Vogt family continues to support the couple's charitable interests.

Claudia and John Holliman visit with Major Dane Yaw, of the Oklahoma City Fire Department, and retired K-9 officer Salsa, who were first trained and partnered by the National Disaster Search Dog Foundation in 2008.

your legacy

## Investing in Community Heroes

For John and Claudia Holliman, their affiliated fund at the Oklahoma City Community Foundation is an investment in the community they call home. "The Community Foundation makes it simple to give back to a number of organizations each year," John said.

One nonprofit the couple enjoys supporting is the National Disaster Search Dog Foundation (SDF), which trains shelter dogs for search and rescue teams throughout the country.

"Since the Hollimans' initial gift in 2011, SDF-trained search teams have deployed to 93 incidents, including three missing person searches and five tornadoes in Oklahoma," said Debra Roets, SDF philanthropy and grants officer. "Their philanthropic investment continues to have a lasting impact, providing lifesaving aid to residents in the aftermath of disasters."

# Community Affiliated Funds

*These permanent endowments 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

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 and the Laura Cross Award for graduating nurses.

## John Kirkpatrick Fund for Historic, Cultural and Civic Understanding | 2016

The fund supports charitable and educational programs and activities that promote the historic, cultural and civic understanding of the Oklahoma City community.

## Lawton Community Foundation | 1999

The Lawton Community Foundation is an affiliate organization of the Oklahoma City Community Foundation that serves the charitable needs of Lawton and the surrounding area. Since its inception, the Lawton Community Foundation has reinvested more than \$5.4 million back into the community through scholarships, community grants and annual distributions to charitable organizations. For more information, please visit [www.LawtonCF.org](http://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 awarded community and classroom enhancement grants in the seven rural communities where Shamrock Bank operated. 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 visit [www.RuralOklahoma.org](http://www.RuralOklahoma.org).

## Making an Impact Statewide



When Carolyn Watson established the Rural Oklahoma Community Foundation 23 years ago, she was on a mission to bring cultural opportunities to communities like her small town of Coalgate, Oklahoma. Since then, nearly \$3 million in grants and scholarships has been awarded to rural communities throughout the state.

In 2018, Carolyn's generosity helped to bring a unique, literary experience to children living in rural communities like Coalgate, Heavener, Stigler, Tishomingo, Atoka and Wilburton. The Oklahoma Hall of Fame's interactive children's reading program, Stories Across our State, visited these rural, public libraries thanks to a grant from the Rural Oklahoma Community Foundation.





your legacy

Lawton Food Bank executive director Jeri Mosiman pictured at the organization's Food Resource Center.

## A Fruitful Partnership

The Lawton Food Bank has been serving families in southwest Oklahoma for more than 30 years.

In 2008, the organization established an endowment with the Lawton Community Foundation and reinvests the annual distributions to help grow the fund. They also apply for community and matching grants every year.

What executive director Jeri Mosiman thinks is most important for the food bank, however, is the trustworthiness that comes with the partnership.

“Being a part of the Lawton Community Foundation and in turn, the Oklahoma City Community Foundation, gives us credibility,” said Jeri. “Donors can see our affiliations and they know we’ve been vetted – they KNOW we take their donations seriously.”

# Benefactors

These donors have made cumulative gifts of \$10,000 or more to permanent endowment funds or have endowment funds with balances of \$10,000 or more. Find a complete list of donors at [occf.org/donorlist](http://occf.org/donorlist).

## A

Shilpa Abbitt - Big A Charitable Fund\*  
Jack H. Abernathy  
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Ray & Lucille Ackerman  
Ad Astra Foundation\*  
Michael G. Adams\*  
Renee Adams  
Russell Lee & Carolyn Sue Adams  
Tom Adams  
Steven C. Agee\*  
Clyde Albright Fund  
Tom S. & Marye Kate Aldridge  
Patrick & Linda Alexander\*  
J. Lynton Allred  
Ann Simmons Alspaugh  
American Fidelity Corporation & Foundation\*  
Fisher & Jewell T. Ames  
Anderson Family Fund\*  
Guyton Anderson III  
Anna Andrash & Joe Andrash\*  
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AnSon Corporation  
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C.R. Anthony Foundation  
Guy M. Anthony Jr.  
Guy Mauldin Anthony Memorial Fund  
Ray T. Anthony  
Antioch Cemetery Association\*  
Arlington-Kellerby Cemetery Fund  
Armed Forces-John E. Kirkpatrick Fund  
Sue Ann Arnall  
Arneson Charitable Foundation  
Ora Ashwell Fund for Indigent Children  
William H. & Martha E. Atkinson Foundation

## B

Bachelors' Club of Oklahoma City  
Betty L. Baker Memorial Fund  
John K. Baldischwiler  
BancFirst\*  
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David W. & Catherine Mae Bardwell  
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Museum of Art\*  
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Lt. Gen. (Ret.) Richard A. & Sally F. Burpee  
Nadyne J. Ice & Merrill Burruss Jr.

\*Donors who made a gift during Fiscal Year 2018.

David & Mary Beth Busby  
Carl Busch  
Bernice Butkin  
Melva Byer

## C

Cain's Coffee Company  
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Carrington/Hall Fund\*  
Tilda Caruthers Scholarship Fund  
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Richard Coyle & Carolyn Berry Families  
Bess M. Crane



Shilpa Abbitt pets Targa, a hospital therapy dog at The Children's Hospital at OU Medical Center.

## Lending a Helping Paw

After the death of her son Austin in 2013, Shilpa Abbitt focused her philanthropy on helping kids remain kids – especially those who have chronic or life-threatening illnesses. To expand her charitable impact, she established the Big A Charitable Fund at the Oklahoma City Community Foundation.

“Hospitals can be frightening for young children,” said Shilpa. “The Big A Charitable Fund was created to help them be kids and better cope with their situation.”

In 2017, Shilpa’s philanthropy came with furry paws and a bushy tail as a gift from her fund helped Oklahoma City’s Children’s Hospital Volunteers obtain an additional therapy dog to provide loving comfort for its young patients.

Crawley Family Foundation\*  
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KC Holloway Family Fund\*



your legacy

Ronna and Larry Davis created an advised fund at the Oklahoma City Community Foundation to support Temple B’Nai Israel.

## Giving Made Easy

Larry and Ronna Davis are proud to be part of a long series of contributors supporting Oklahoma City’s Jewish community. For years, the couple has leveraged the Kirkpatrick Family Fund’s matching grant program to make a greater impact with their giving.

Earlier this year, they made a gift of appreciated stock to create a donor advised fund in support of Oklahoma City’s Temple B’Nai Israel.

The simplicity of the tax-wise giving vehicle offered through the Community Foundation was a bonus for the couple.

“Our transaction was effortless,” said Larry. “It easily allowed us to create a perpetual source of income for an institution dear to our hearts.”

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Fund  
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Carolyn L. Merritt  
Arlene & Bob Merson



your legacy

Jones firefighter Mark Taylor gives Madewell & Madewell co-owner Carmalieta Wells a tour of the newly-expanded fire station.

# Recycled Generosity Helps Community Thrive

When Mr. Madewell handed his battery recycling company in Jones, Oklahoma, off to Carmalieta Wells and Bill Dean, he also passed down a legacy of doing good. To help continue his tradition, the new owners established a charitable fund at the Oklahoma City Community Foundation to support educational and civic initiatives throughout the Jones community.

“A need arises and we figure out how to meet it head on,” said Carmalieta.

Most recently, the company used the fund to support a building addition for the Jones Volunteer Fire Department.

“We wouldn’t be able to do what we do without the help of Madewell & Madewell,” said Jones firefighter Mark Taylor. “They’ve given so much and are so supportive of this community.”

Harry & Hedra Merson\*  
The Midland Group  
Betty Skogsberg Milam  
Larry L. & Donna N. Miles  
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Quail Creek Bank\*  
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## S

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Frank Swan  
Richard E. & Geneva T. Swan  
Mr. & Mrs. M.A. Swatek Memorial Fund  
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Tom Swyden  
Don R. & Mary Louise Symcox

## T

Richard G. Taft Jr. Memorial Fund  
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Janet M. Taliaferro  
Tarpai Emese Mind, Body & Spirit Fund\*  
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R. Clark & Jane Taylor  
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Larry & Mary Trachtenberg\*  
Guy B. & Louise Treat  
Mr. & Mrs. Morrison G. Tucker  
Jeanine & Jack E. Turner  
Robert E. & Martha Turner  
Tyler Family\*

## U

Berrien Kinnard Upshaw  
Kathleen Everett Upshaw  
Uptown Kiwanis Youth Foundation

## V

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Mr. & Mrs. Lawrence V. Van Horn  
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Steve Vaughan  
Mr. & Mrs. R. Dale Vaughn\*  
Anne Eleanor Venters  
Harley Eugene Venters Jr.  
Villa Teresa School  
Zarah L. Virgin  
Visiting Nurses Association  
Leon G. Voorhees Memorial Fund  
Vose Foundation  
Voth Family Charitable Fund

## W

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Tom & Jane Ann Workman  
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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

# Major Donors

*These donors have made cumulative gifts of \$1,000-\$9,999 to permanent endowment funds and made a gift during Fiscal Year 2018. Find a complete list of donors at [occf.org/donorlist](http://occf.org/donorlist).*

Bank of America Foundation  
Bank of Oklahoma Foundation  
James Barnes  
Kelley Barnes  
Albert E. Bauman III  
Mary Ann Bauman  
Clarence & Marsha Beatty  
Bob & Debbie Blackburn  
Lisa Blackburn  
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Robert Brickner  
Louis Brigham  
John & Marion Brown  
Bryan & Chelsea Burroughs  
Mary Gilmore Caffrey  
J. Greg Calmes  
Joe & Lori Carter  
Central Liquor Company  
The Chickasaw Nation  
Donald M. & Yvonne Clark  
Larry Clark  
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Kay Cragar Wilson  
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Terri Cooper and Oklahoma City Philharmonic music director Alexander Mickelthwate at an orchestra rehearsal at the Civic Center Music Hall.

## Sustaining the Arts for Future Generations

Terri Cooper has long held a deep appreciation for the arts. She began volunteering for arts organizations at an early age and continues to contribute her time and resources to a number of cultural institutions in Oklahoma City, currently serving as president of the board for the Oklahoma City Philharmonic.

Through her involvement with nonprofits like the Arts Council Oklahoma City and Leadership Oklahoma City, Terri became aware of the importance of endowment and began making gifts to help sustain a number of community organizations.

“Through the power of endowment, the Oklahoma City Community Foundation enables gifts of all sizes to make a significant impact,” Terri said.

# Advised Funds

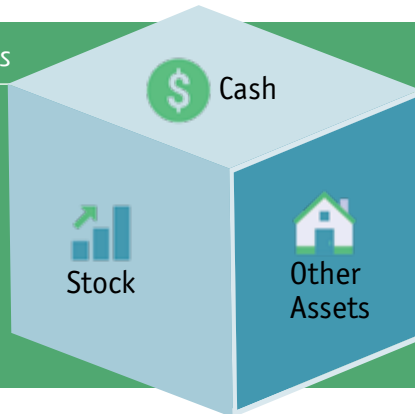
## Creating a Legacy While Making an Impact

Advised funds are one of the easiest and most tax-advantageous ways to give to charity, allowing you to support all of your favorite charities with just one gift! At the Oklahoma City Community Foundation, we offer a variety of advised fund options to provide you with the flexibility to accomplish your charitable goals, whatever they may be.

### How an Advised Fund Works

#### 1. Make a tax-deductible charitable gift.

You can establish an advised fund with a charitable gift of cash or other assets like real estate, appreciated securities, oil and gas royalty interests or life insurance. You will also be eligible for an immediate tax deduction.



**2. Grow your gift, tax-free.** While you're deciding which charities to support, your gift can potentially grow based on your investment preferences and the type of advised fund you choose, resulting in even more money available for charities.

**3. Support the charities you love.** You have the flexibility to support your favorite charities now, or to make grants to charitable causes over time, and we handle all of the administrative details.

### Bundling Donations

With the recent increase in the standard tax deduction, many donors are using advised funds to “bundle” charitable gifts for several years into one calendar year. This strategy allows you to exceed the standard deduction in one tax year, while using an advised fund to support your favorite charitable causes over several years.

“Bundling charitable gifts from multiple years allows us to maximize our charitable tax deduction while still making annual gifts to support our favorite charities. Instead of gifting cash every year, we use our advised fund to make our regular donations. Every few years, we plan to reload the advised fund using our annual income, exceeding the new standard deduction to receive a tax break for that year. It’s a win-win!” – Joe Crosthwait

### Advised Fund Options:

#### Legacy Fund

- Great alternative to a private foundation.
- Minimum initial gift of \$20,000.
- Permanent endowment fund allowing you to grant 5 percent annually to qualified charities.
- Earns investment returns.
- Ability to name successor advisors.

#### Gift Fund

- Effective alternative to commercial gift funds.
- Minimum initial gift of \$20,000.
- Can be completely granted out to qualified charities at any time.
- Earns investment returns.
- Ability to name successor advisors.

#### Express Fund

- Ideal vehicle for year-end gifts of appreciated securities or cash.
- Minimum initial gift of \$1,000.
- Can be completely granted out to qualified charities at any time.
- Does not receive investment returns.
- Ability to name successor advisors.

Let us help you create your charitable legacy.

Visit [occf.org/fundoptions](http://occf.org/fundoptions) or call us at 405/235-5603.

FY2018

**28 new advised funds**  
established by donors

**\$19.7 million** in grants awarded  
to **1,162** charitable organizations

**497** total advised funds

[occf.org](http://occf.org)

# A Plan for the Future

A longtime educator and former Marine, Nola Casey traveled the world, but her heart remained in Oklahoma with Mason High School. Nola believed in the importance of education, and before her death she created a plan in her will to share those values with others. By gifting her estate to the Oklahoma City Community Foundation, she created a scholarship fund to help students graduating from Mason High School attend college.

“The Nola Casey Scholarship is making my dream of graduating college debt-free possible,” said Garret Crawford, a recipient of the Nola Casey Scholarship.

To learn how the Oklahoma City Community Foundation can help you make a plan for the future of your estate, visit [occf.org/wills](https://occf.org/wills).



## Planning Your Legacy

It's never too early to begin planning for the future. The Oklahoma City Community Foundation can help you create a charitable plan that fulfills your unique needs and goals at every life stage. We offer a variety of giving options that can provide future income, care for your family after you are gone, offer estate tax savings and leave a lifetime legacy to charity.

### Giving Options

- Leave a gift in your will.
- Make a gift of appreciated assets like real estate, oil and gas royalty interests or widely- and closely-held stock, bonds and mutual funds.
- Name an endowment fund as beneficiary of your retirement account or life insurance.
- Use your IRA annual distribution for a charitable rollover gift.
- Create a charitable gift annuity to take advantage of recently-increased rates.

Visit [occf.org/yearend](https://occf.org/yearend) to learn more!

**Questions?** Contact Joe Carter | [j.carter@occf.org](mailto:j.carter@occf.org) | 405/606-2914

# In Memoriam

*With appreciation for their lasting contributions to the community, we remember the following:*

## William “Bill” Bell (1935-2017)

Bill Bell loved his work, family and community. He began his distinguished banking career in 1959, quickly rising to the top of the industry becoming president and CEO of Liberty National Bank. He served on many professional, business and cultural boards including the Kirkpatrick Family Fund’s Historic Green Mountain Falls Foundation.

## Carrie Ann Blakey (1964-2018)

A longtime dance teacher and studio owner from Tuttle, Oklahoma, Carrie Ann Blakey’s passion was sharing her love of dance. Her family continues her legacy through the Carrie Ann Nix Blakey Memorial Scholarship benefiting students from Tuttle and the surrounding area.

## Merrill Burruss (1936-2017)

Merrill Burruss was a champion of small town life. He spent countless hours advocating for the employment of veterans, encouraging students and providing professional expertise to charitable organizations. In 2010, Merrill and wife, Nadyne, established the Redlands Community College Burruss Family Scholarship to ensure their legacy continues with future generations.

## Jean Dale (1927-2017)

As a child of the Great Depression, Jean Dale understood what it meant to be thankful, and she lived life that way every day, devoting herself to her family and community. She and her late husband, Everett, contributed and volunteered for a number of charitable organizations throughout the city.

## Richard Davis (1949-2018)

A true Renaissance man, Richard Davis was a talented businessman and musician. His zest for life and creative intelligence made him a natural salesman, helping his family’s wholesale food business, William E. Davis & Sons, become a success. His legacy will continue through the William E. & Margaret H. Davis Family Affiliated Fund.

## Claude Randolph “Randy” Everest (1929-2018)

Randy Everest’s banking career made him a leader in both the banking industry and the community. In addition to founding the Trust Company of Oklahoma, he volunteered as a board member for many organizations and was one of the original fiscal trustees of the Oklahoma City Community Foundation.

## Mary Ruth Ferguson (1909-2018)

Mary Ruth Ferguson traveled the world studying, discovering and bringing the arts to Oklahoma. She served as an advocate, founding member and board member of numerous arts organizations in central Oklahoma. At age 109, she was a living connection between many of the Community Foundation’s founding donors and the community today.

## Vernon Forshee (1928-2017)

A graduate of Oklahoma City’s Central High School, Vernon Forshee was a “Cardinal” to the core. As a driving force behind the Central High School Alumni Association, he was overjoyed to reminisce with former classmates. In 1996, he helped fellow alumni establish an endowed scholarship at the Oklahoma City Community Foundation, commemorating the rich history of Central High School.

## Leamon Freeman (1929-2017)

During his years on the bench, Judge Leamon Freeman saw many defendants who were unable to read and write, stimulating his tireless efforts to start literacy programs in an attempt to decrease incarceration rates. A member of the Downtown Lions Club, he also generously supported the Oklahoma Lions Service Foundation for many years.

## Earl Adair Jones (1924-2017)

A hardworking farmer, Earl Jones found his greatest joy spending time with his family. His faithful spirit and Christian values will continue to shine through his charitable gift to In Search of the Lord’s Way.

## J. Thomas “Tom” May (1936-2018)

A beloved professor, Dr. Tom May’s research on neighborhood health centers and the involvement of minorities in the health care profession led him to volunteer his time and knowledge to the Society for Applied Anthropology. The Anita R. and J. Thomas May Family Legacy Fund he established with his wife will continue to support the causes he cared about most.

## William “Ralph” Meador (1929-2017)

Although a chemist by profession, Ralph Meador was beloved by his family for his penchant for storytelling. One of his greatest pleasures was applying his knowledge of chemistry to his garden, a skill taught by his mother. The Lillian Frances Watts Meador Fund, which he established in her honor, will perpetuate his legacy and her passion for beautiful flowers.

## Mary Nichols (1916-2018)

Working alongside her husband and later her children, Mary Nichols helped build many businesses, including Devon Energy, but it was her ability to connect and impact the community that will be most remembered. Always ready to attend a board meeting, she passionately supported nonprofits, earning numerous awards and leaving a legacy of service.

## Pat Ryan (1939-2018)

Pat Ryan spent his life working to positively influence his community as a city councilman and nonprofit committee and board member. A past member of the Oklahoma City Community Foundation investment committee and Parks & Public Space Initiative, his leadership and commitment to our community will be missed.

## Beverly Starkey (1937-2018)

As a member of the Edmond Kiwanis Club, Beverly Starkey became Key Club advisor, later serving as regional advisor and a trustee. The organization honored her service with the International Hixon Award. The Nevin & Beverly Starkey Edmond Kiwanis Club Scholarship will perpetuate her love for education and the Kiwanis.

## Wanda Swisher (1933-2018)

Wanda Swisher cherished being a mother to her seven children with husband Bill. Her maternal instinct also inspired her to advocate for children in need through her service to the YWCA and The Children’s Center. She will be remembered for her incredible tenacity, as well as her efforts to make her hometown a better place for future generations.

# Martha King

(1935-2017)

From an early age, Martha King was taught the value of hard-work and generosity. As a member of the Benedictine religious order and a young teacher, she passed this lesson on to her students. Known as “Sister Pauline,” she challenged her students, encouraging them to understand how those less fortunate live. Later, Martha embarked on a journey devoted to serving her community. As the co-founder of Neighbor for Neighbor and the nationwide volunteer director for World Neighbors, she found her calling assisting people with emergency needs. Following the bombing of the Alfred P. Murrah Federal Building, she came to the Oklahoma City Community Foundation as a volunteer helping coordinate assistance to the survivors. For more than 20 years, she served as a trustee for our Disaster Relief Fund and volunteered with our Trustee Scholarship Initiative. Her legacy continues to make a difference through the Martha King Scholarship Fund.



## William Thurman (1928-2018)

As president of Oklahoma Medical Research Foundation, Dr. William Thurman had a keen eye for talent and trends in research that helped him create a world-class medical research facility. His leadership extended to the community where he served as a past Trustee of the Oklahoma City Community Foundation and was a volunteer and advocate for many organizations, most notably The Children’s Center.

## Harley Venters (1922-2018)

A state representative, judge and attorney, Harley Venters’ passion for justice and politics was equally matched by his devotion to his faith and love of ranching. An active community and church leader, he was a founding member of the Interfaith Alliance of Oklahoma. The funds he and his wife, Anne, established in memory of their two children will continue to support the family’s love of animals.

## Kerry Wagner (1956-2018)

Kerry Wagner loved helping the community as a workers’ compensation attorney. While she was proud to follow in her family’s footsteps practicing law, it was her family and their adventures together that made her life complete. Her family established the Kerry Gossett Wagner Memorial Fund in her honor.

## William “Bill” Yinger (1926-2017)

Oilman Bill Yinger was a model of faith and Christian service. As a leader for many community organizations, he inspired and ministered to thousands. Even in death, he is an example of serving one’s neighbor through the Bill and Joan Yinger Legacy Fund that will continue to support the charitable organizations he cared about.



Photo by Brandon Smitder.

By making a gift of real estate to Skyline Urban Ministry's endowment, Bill Elliott is helping to sustain programs like a low-cost clothing closet for our community's most vulnerable citizens.



## Partnering to Help Nonprofits Thrive

At the Oklahoma City Community Foundation, we connect generous donors with hardworking charitable organizations to make a difference in our community. Through our charitable organization endowment program, we help strengthen nonprofits by fostering endowment growth and providing donors a way to make a lasting contribution.

For many charities, this connection allows them the flexibility to accept complex gifts such as stock, retirement assets, real estate and oil and gas interests. In 2017, when donor Bill Elliott came to Skyline Urban Ministry with a gift of rental property, the nonprofit knew just who to call for help.

“We weren’t sure what to do because we didn’t have the capability to sell a house,” said executive director Rev. Deborah Ingraham. “Thankfully, I had recently attended the Community Foundation’s Seeds of Planned Giving workshop where I learned they could facilitate the gift for us and deposit the proceeds from the sale into our endowment. They handled everything and it couldn’t have been simpler.”

Affiliated with the United Methodist Church, Skyline provides a number of services for Oklahomans in need through a clothing closet, food resource center, eye clinic and street outreach program. By continuing to build their endowment at the Oklahoma City Community Foundation, the group is ensuring their work in the community will continue for years to come.

# Charitable Organization Endowment Program

With permanent funds for 360 charities serving our community, the Oklahoma City Community Foundation administers the largest endowment program for charitable organizations in the nation. These funds provide charities with an annual source of income and offer donors a way to ensure their charitable gifts make a lasting difference.

## Training for Nonprofits

We empower nonprofits to sustain their programs by providing them with training and resources to build their endowment funds. In 2019, we will offer a Focus on Endowment and GiveSmartOKC training series. In addition, our Seeds of Planned Giving workshop teaches organizations how to work with donors to provide flexible giving options through wills, estates and other unique assets. Learn more at [occf.org/seeds](http://occf.org/seeds).

## Kirkpatrick Family Fund Endowment Matching Grants

Through the Kirkpatrick Family Fund, charitable organizations may apply for matching grants for gifts to their endowment fund at the Oklahoma City Community Foundation. To make a gift to an organization currently participating in the match, visit [occf.org/kffmatch](http://occf.org/kffmatch). Nonprofits can learn more at [kirkpatrickfamilyfund.org](http://kirkpatrickfamilyfund.org).

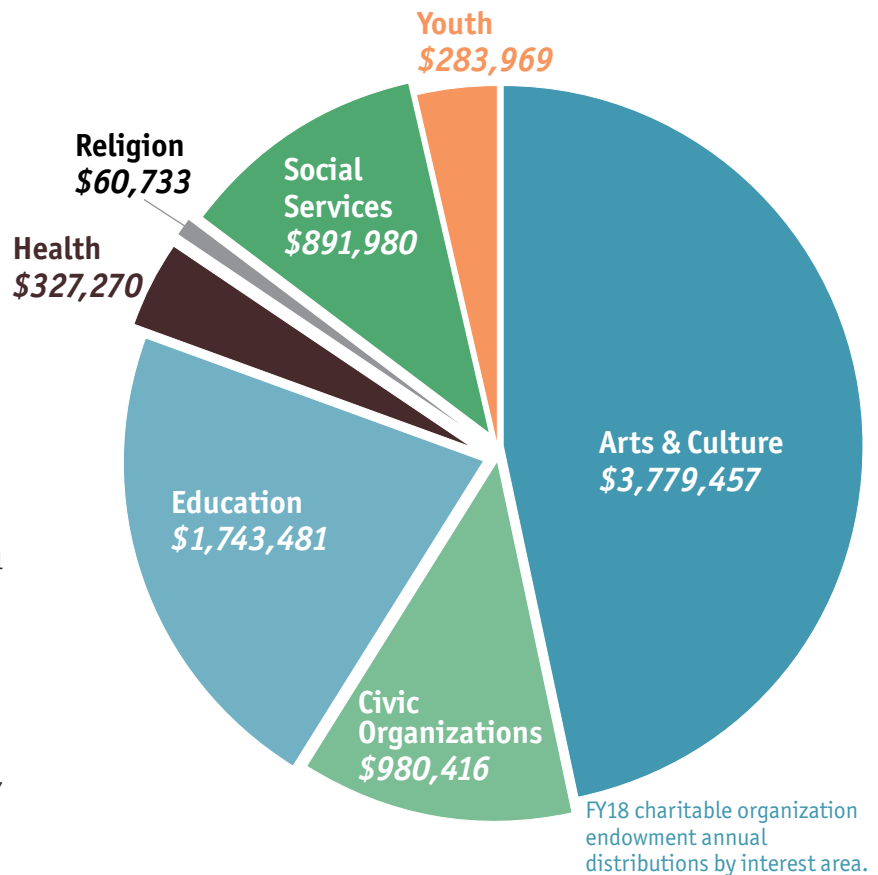
## Why Give to an Endowment?

A gift to a permanent endowment is a commitment to the organization's future. Since the funds are permanent, annual distributions to the charity will continue forever, helping the organization carry on its important work in the community for years to come.

## How to Give

You can make a gift to any of the endowment funds we administer through a variety of giving options including cash, real estate, appreciated securities, life insurance policies or through a gift in your will or trust. Visit [occf.org/coegift](http://occf.org/coegift) to learn more.

## Where do our charitable organization endowment distributions go?



FY2018

**360 charities** received:

Total of  
**\$8.06 million**

Average distribution of  
**\$13,074**

**\$7.5 million**  
endowment gifts from donors

**\$855,200** in Kirkpatrick Family Fund matching dollars

[occf.org/coeprogram](http://occf.org/coeprogram)

# your community



Thanks to ongoing support from generous donors like Ralph Pickle (pictured left), Westview Boys' Home resident Kaden Richardson successfully finished high school and is preparing to leave the campus to attend college.



## A Gift That Keeps on Giving

For 20 years, Ralph Pickle gifted residents of the Westview Boys' Home in Hollis, Oklahoma, with spending money for birthdays and Christmas. Before Ralph's death in 2017, his nephew Randy helped him establish the Ralph Pickle Family Fund to continue this tradition.

This generous gift inspired Westview to create their own charitable organization endowment fund at the Oklahoma City Community Foundation that will be supported through matching grants from Ralph's fund.

"Ralph left quite a legacy for Westview," said Ron Bruner, executive director for the home. "Though he is no longer with us, his impact is stronger than ever. We're forever grateful."

# Charitable Organization Endowments

*Categorized by service area, these charitable organizations have established an endowment as of June 30, 2018. Endowment sub-funds with a value of \$10,000 or more are listed under each parent organization and receive an annual distribution for a designated purpose. Find a complete list of funds and fund balances at [occf.org/coelist](http://occf.org/coelist).*

• *Affiliated fund, see page 40*

\* *New fund established in Fiscal Year 2018.*

## 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  
• Carolyn P. Nuckolls Music Opportunities Fund  
Lawton Philharmonic Society  
Lyric Theatre of Oklahoma  
• Curt Schwartz Scholarship  
Jasmine Moran Children's Museum  
National Cowboy & Western Heritage Museum •  
Oklahoma Arts Institute  
Oklahoma Children's Theatre  
Oklahoma City Ballet  
• Yvonne Chouteau School Fund\*  
• John Kirkpatrick Executive Director Fund\*  
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  
• Eickman Family Education Fund  
• Donald L. & Lois Jones Education Fund  
• Warren Keigwin Fund  
• Lectureship 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  
Vocal Sounds of Oklahoma

## Community Development

Association of Fundraising Professionals, Oklahoma Chapter  
ESCCO - Executive Service Corps of Central Oklahoma  
Executive Women 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  
Neighborhood Alliance of Central Oklahoma  
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

Start Helping Impacted Neighborhoods Everywhere (S.H.I.N.E.)  
Foundation  
Jim Thorpe Association  
Women of AT&T, Oklahoma City Chapter  
Women of the South

### 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  
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  
• Carolyn Young Hodnett Scholarship Fund  
• Eleanor Kirkpatrick Fine Arts Chair Fund  
• John E. Kirkpatrick Humanities Chair Fund  
• Jane B. McMillin Memorial Fund  
• Records Family Scholarship Fund  
• Scholarships Fund  
Christ the King Catholic School  
• James C. & Virginia W. Meade Fund  
Christian Heritage Academy  
Classen High School Alumni Association  
Crescent Public Schools Foundation  
Deer Creek 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  
• Tom E. Moore Fund in Honor of the Men of '54\*  
• 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 Schools Foundation  
Putnam City 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. 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 Foundation  
• 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  
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
- 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
- Opera Association Fund
- Petree School of Music Fund
- William & Pam Shdeed Law School Fund
- Societies Fund
- Florence Wilson Voice Awards 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

- Romaette Bryant Memorial Nursing Scholarship
- Burrus Family Scholarship
- El Reno Masonic Lodge #50 - Aggie Club Scholarship
- Scott L. Harlan Memorial Endowed Scholarship
- Howard & Rebecca Rainey Hutson Scholarship
- Tyler Knecht Memorial Endowed Scholarship
- Masonic Fraternity of Oklahoma Endowment Fund
- Tommy Pinkston Family Memorial Scholarship
- James Shaw Scholarship
- Trotter-Gambel Scholarship
- Ruth Louise Wallace Nursing Endowed Scholarship

## Southern Nazarene University Scholarship

## Francis Tuttle Foundation

## 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

Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha

Markoma Christian Ministries

Oklahoma Engineering Foundation Scholarship

- Central Chapter Auxiliary 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

## Environment & Animals

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

Myriad Gardens Foundation

- Meinders Building and Maintenance Endowment

- Meinders Garden Maintenance Endowment

The Nature Conservancy - Oklahoma Chapter

- James K. Hotchkiss Fund for the Nickel Preserve

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

Second Chance Animal Sanctuary

The Tree Bank

## Health-Related

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

Children's Hospital Foundation

The Children's Hospital Volunteers

Community Health Center - Mary Mahoney Memorial Health Center

Epilepsy Foundation Oklahoma

Fundación Manos Juntas - Dr. Boyd Shook Fund

Health Alliance for the Uninsured

Hearts for Hearing Foundation

INTEGRIS Foundation

- Baptist Burn Center Fund

- James L. Hall Jr. Center for Mind, Body & Spirit Fund

- INTEGRIS 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 Aids Care Fund

Oklahoma Blood Institute

Oklahoma Caring Foundation

Oklahoma Heart Hospital Research Foundation

Oklahoma Lions Sight Conservation Foundation\*



your community

## Bringing Bluegrass to a New Generation

The twang of the banjo, rhythm of the bass and a little fiddle for fire gets those toes a-tapping. In 1996, Oklahoma's International Bluegrass Festival started to bring people together to teach, preserve and enjoy bluegrass music. Twenty-two years later, it's become a culture of its own with thousands descending upon Guthrie, Oklahoma, every year to share their love of bluegrass.

"Music connects generations and nationalities – people may not be able to speak to each other, but they can play together," festival board member Jim Blair said. "It's really something special, and we want to ensure it continues indefinitely."

In 2015, Oklahoma's International Bluegrass Festival established an endowment fund at the Oklahoma City Community Foundation with a goal to raise \$2.4 million to support the future of the festival for generations.

Oklahoma Medical Research Foundation

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

Oklahoma Physical Therapy Foundation  
 Planned Parenthood Great Plains  
 Russell-Murray Hospice  
 St. Anthony Hospital Foundation  
 Stroud Regional Medical Center Foundation  
 TRC - The Recovery Center  
 Variety Care  
 Vizavance

## History & Preservation

45th Infantry Division Museum  
 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

- Lovell Historical Monument Maintenance Fund\*

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
- Ponca City Chapter Fund
- Oklahoma Scholarship Endowment
- Veterans First Fund

Oklahoma State Firefighters Museum  
 Oklahoma Westerners Indian Territory Posse  
 Overholser Mansion

- Dianne Gumerson Memorial Fund

Preservation Oklahoma  
 Stillwater Museum Association - Sheerar Museum

## Neighborhood Associations

Crown Heights-Edgemere Heights Neighborhood Association  
 Edgemere Park Preservation Area  
 Historic Brookhaven Neighborhood Association

Mesta Park Neighborhood Association  
 Putnam Heights Preservation Area - Anderson Family Endowment  
 Shartel Boulevard Development Authority

## Religion

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

- Hartsuck Music Fund
- 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

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

## Senior Adult Services

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  
 Spanish Cove Retirement Centers

## Social Services

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.  
 Center of Family Love\*

Central Oklahoma Association for the Deaf & Hard of Hearing  
 A Chance to Change  
 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  
 Faith Works of the Inner City  
 Firststep - OKC Metro Alliance  
 Genesis Project  
 Goodwill Industries of Central Oklahoma  
 HeartLine  
 Homeless Alliance\*

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  
 Make-A-Wish Foundation of Oklahoma  
 Make Promises Happen - Central Oklahoma Camp  
 McCall's Communities for Life Enrichment  
 Meadows Center for Opportunity  
 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  
 • Eddie & Beth Perkins Family Fund\*  
 Oklahoma Foundation for the Disabled  
 Oklahoma Halfway House  
 Oklahoma Lawyers for Children  
 Parent Promise  
 Peppers Ranch  
 Pivot - A Turning Point for Youth  
 Rainbow Fleet  
 Regional Food Bank of Oklahoma  
 Reliant Living Centers of Oklahoma  
 Dale Rogers Training Center  
 The Salvation Army  
 • Building Maintenance Fund  
 • Ed Leslie Fund  
 Skyline Urban Ministry  
 Special Olympics Oklahoma  
 Speck Homes  
 Sunbeam Family Services  
 TEEM - The Education and Employment Ministry  
 Trinity Legal Clinic  
 United Methodist Boys Ranch  
 United Way of Central Oklahoma  
 Upward Transitions  
 Urban League of Greater Oklahoma City  
 The Urban Mission  
 The Virtue Center  
 Westview Boys' Home\*  
 White Fields  
 Willow Springs Boys Ranch  
 Work Activity Center  
 World Neighbors  
 WovenLife  
 Youth & Family Services, Inc. - El Reno  
 YWCA Oklahoma City

## Youth Services

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

Noble County Family YMCA  
 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  
 Whiz Kids - City Care  
 YMCA of Greater 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

## Out-of-state

95th Division Foundation, Fort Wayne, Indiana  
 American Hebrew Academy, Greensboro, North Carolina  
 Groundswell International, Washington, D.C.  
 Institute of International Education, Houston, Texas  
 • Colin & Brooke Lee Fund  
 • Alice Pratt Internship Fund  
 International Photography Hall of Fame, St. Louis, Missouri  
 Morris Animal Foundation, Denver, Colorado  
 Sisters of Benedict, Atchison, Kansas  
 Southwest Park and Recreation Training Institute, Dallas, Texas  
 United States Air Force Academy, Colorado Springs, Colorado  
 United States Military Academy, West Point, New York  
 United States Naval Academy, Annapolis, Maryland  
 United National Indian Tribal Youth - UNITY, Mesa, Arizona  
 Westerners International, Canyon, Texas

# Bridging the Classroom Gap

Photo by Brandon Snider.



The 1980s brought big dreams and growth to Deer Creek. But as the population and schools boomed, the classroom funding did not. They needed an answer.

“The idea was simple. Create something to bridge the gap and set the district up for success indefinitely,” Deer Creek Schools Foundation treasurer Jaena Poppe said. “Our endowment at the Oklahoma City Community Foundation made this dream a reality, allowing us to focus on providing for our classrooms and students!”

## Charitable Organization Endowment Affiliated Funds

*Providing long-term support for charitable organizations, these funds differ from other charitable organization endowment funds in both size and structure. 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 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, pop, 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.

# GiveSmartOKC.org

Whether you are a charitable organization in central Oklahoma or a donor looking to make a difference, GiveSmartOKC is your partner for informed and impactful charitable giving. Powered by GuideStar USA, GiveSmartOKC helps connect local charities with generous donors to make a greater impact.

## A Giving Resource for Donors

- Free for the public to use.
- Easily find local charities that fit your interests.
- Learn how nonprofits are using your charitable dollars by reviewing their financial, governance and program data.

## An Outreach Tool for Nonprofits

- Free for 501(c)(3) charities to join.
- Meet the top standard in transparency.
- Tell your organization's story to better connect with donors and other funders.

To get started, visit [GiveSmartOKC.org](http://GiveSmartOKC.org)

FY2018

**300 local charities** featured on [GiveSmartOKC.org](http://GiveSmartOKC.org)

Know More. Give More.

## Empowering Nonprofits with GiveSmartOKC

For every pet to have a home, everyone would need to adopt seven animals – that's 28 pets for a family of four!

Best Friends of Pets' solution: reduce the population by spaying and neutering pets. But affecting change and spreading this message can be difficult.

"GiveSmartOKC has been a great tool for us," Kim Schlittler, Best Friends of Pets executive director said. "It's allowed us to reach new audiences and be transparent with our donors."





Grants from our Margaret Annis Boys Trust and Parks & Public Space Initiative funded the installation of tree identification signage throughout the Margaret Annis Boys Arboretum at Will Rogers Gardens to help visitors learn about the diversity of tree species located throughout the park.



# Growing a Greater Community

Through our community program initiatives, the Oklahoma City Community Foundation brings together passionate donors, nonprofits and community leaders to fill unique gaps in the community. We work together to meet ever-changing needs, respond to emerging issues and create a greater impact.

This collective impact can be witnessed throughout our community's parks and public spaces. Through our Margaret Annis Boys Trust and Parks & Public Space Initiative, we have worked together with the City of Oklahoma City, park departments, neighborhood associations, public schools and other community groups to improve public lands in central Oklahoma. This collaboration may be best showcased at the Margaret Annis Boys Arboretum at Will Rogers Gardens.



Located at Northwest 36<sup>th</sup> Street and Grand Boulevard, the 10-acre public arboretum and gardens feature hundreds of tree varieties dating back to the 1930s. The Oklahoma City Community Foundation has supported a number of improvements to the arboretum including a more accessible walking trail, planting more than 100 new trees and the installation of signage to help residents learn about the tree species that grow well in central Oklahoma. In addition, an endowment at the Oklahoma City Community Foundation supports the long-term maintenance and care of the arboretum, ensuring this urban oasis continues to adorn our city for years to come.

# Scholarship Program

Through our scholarship program, we help passionate individuals, families and organizations provide educational opportunities for students who will become our nurses, architects, teachers and community leaders of tomorrow. Together, these funds comprise the largest scholarship program in Oklahoma that is designed to help students attend the college of their choice.

## Trustee Scholarship Initiative

In addition to the scholarships established by individual donors, the Oklahoma City Community Foundation awards scholarships through our Trustee Scholarship Initiative. Established in 1998, the initiative includes the following five programs designed to encourage more students in Oklahoma to attend college.

### • Community Foundation Scholars

**94 students each received \$2,000 awards for the 2018-19 Academic Year**

Rewards an underserved segment of college-bound students who do not qualify for the most competitive academic scholarships, but who are good students and active in their school and community.

### • New Opportunities Scholars

**111 students each received \$2,000 awards for the 2018-19 Academic Year**

Helps students become the first in their family to pursue education beyond high school. Scholarship recipients apply as high school juniors and must complete a series of college preparatory activities.

### • Oklahoma Youth With Promise Scholars

**45 students received awards for the 2018-19 Academic Year**

Awards scholarships to students who graduate high school while in Oklahoma's foster care system.

### • Nurse Education Program

**9 students received awards for the 2018-19 Academic Year**

Offers scholarships to third- and fourth-year college students enrolled in a nursing program, as well as practicing registered nurses who are pursuing a nursing-related bachelor's degree.

### • Central Oklahoma Guidance Counselor Network

**54 central Oklahoma high schools participated**

Provides free training for high school guidance counselors and ensures their school's eligibility for scholarships.

## [occf.academicworks.com](http://occf.academicworks.com)

Our convenient, online student application process at [occf.academicworks.com](http://occf.academicworks.com) makes it easy for students to apply and enables our scholarships to reach a greater number of potential applicants.

## How to Give

Whether you want to establish a legacy, honor a loved one or give back to your alma mater, the Oklahoma City Community Foundation can help you achieve your charitable goals while giving deserving students the opportunity to follow their dreams. To learn how to make a gift to any of the scholarships we administer or create a new scholarship fund, visit [occf.org/scholarshipgiving](http://occf.org/scholarshipgiving).

FY2018

**\$2.5 million**  
awarded to  
**730 students.**

**145 scholarship opportunities**  
available for students.

[occf.org/scholarships](http://occf.org/scholarships)

# your impact



Alberta Brannon's son James, his wife Mary Brannon, granddaughter Barbara King and son Larry Brannon.

## Serving up Scholarship Support

Alberta Brannon never met a stranger. Her hospitality, homemade rolls and hot apple pie made Alberta's Tea Room a favorite in the community for more than 25 years.

Although the family business closed in 1998, her catering business, Brannon Catering, is still operated by three of her sons. In 2008, her sons established a memorial scholarship in her name to support students pursuing education in the culinary, hospitality or food service industry.

"Catering has been in our family for many years," said Larry Brannon. "We're thrilled to help a student further their passion for this industry," said Larry Brannon.

# Scholarship & Award Funds

The following scholarship and award funds were established at the Oklahoma City Community Foundation as of June 30, 2018.

*\*New funds established during Fiscal Year 2018.*

95th Division Scholarship  
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  
BSO Ivy Foundation Scholarship  
Bank of Oklahoma Achieving New Goals Scholarship  
John Barresi Memorial Scholarship  
Bennett Family Scholarship  
John Blaess Memorial Scholarship  
Carrie Ann Nix Blakey Memorial Scholarship\*  
Patrick S. Bonds Memorial Scholarship  
April Bowman & Samantha Bowman Fiscus Scholarship for Northwest  
    Classen High School\*  
Vinita F. Boyer Scholarship  
Alberta Brannon Memorial Scholarship  
Dr. Eugene S. Briggs Memorial Scholarship  
Jennifer Lea Briggs Community Foundation Scholars Award  
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  
Nola Casey Scholarship\*  
Central High School Alumni Association Scholarship  
Central Oklahoma ASHRAE Scholarship  
Lonnie & Nancy Childress Scholarship at Oklahoma Panhandle State  
    University  
Kimberly Kay Clark Memorial Scholarship – Naval Reserve Association  
Classen '55 Scholars Fund  
Classen Awards Foundation  
Classen Class of 1945 Scholarship  
Classen Class of 1954 Scholarship  
Classen High School Alumni Association Scholarship  
Ralph Clinton Scholarship – Sales & Marketing Executives  
James D. & LaVerna L. Cobb Scholarship for the OSU School of Civil &  
    Environmental Engineering\*  
Commander Family Scholarship  
Brad R. Corbett Memorial Academic Trust  
Jean Hawley Curtis Scholarship  
Harley Custer Memorial Scholarship  
DANA Corporation Scholarship  
Dortha Dever Business Scholarship – Oklahoma City University  
Douglass High School Class of 1967 Scholarship  
Durant Community Scholarship  
Durrell Public Law Research Award  
Early Childhood Association of Oklahoma Scholarship  
Embassy of Korea  
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 – Oklahoma City University  
John Meacham Fogg Memorial Scholarship\*  
Karen Sue Freeman Memorial Scholarship  
Irene P. & Samuel F. Frierson Educational Trust  
Friends of Kim Jones-Shelton Scholarship  
Fulmer Trombone & Musicians 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  
Karen Hampton Memorial Scholarship  
Harris Harding Scholarship  
Mary Louise Hartpence Scholarship  
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  
Ironworkers Local 584 Harvey A. Swift Scholarship  
Virgil & Pauline Jackson Scholarship  
Dennis James Scholarship – Deer Creek Baseball  
Miles Jenkins Memorial Scholarship  
Kay Jewell Scholarship  
William M. & Janet S. Johnson Scholarship  
Jones High School Scholarship  
Richard Kells Memorial Scholarship – Oklahoma City University  
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  
Valerie Koelsch Memorial Scholarship  
Donna & Harry Kornbaum Scholarship  
Larry J. Kramer, 1959, U.S. Grant High School Scholarship  
PFC Anthony Adam Landers “Zero to Hero” Scholarship  
Sally Jo Clark Langston Memorial Scholarship  
Wann & Clara Langston Scholarship  
Learning With Love’s Scholarship  
Tommy & Jackie Maxon Scholarship  
Charles B. McCauley Community Foundation Scholars Award\*  
June Mitchell McCharen Scholarship  
McGee Foundation Scholarship Fund  
Janet McNutt Harding High School Music Scholarship\*  
Gene & Sylvia McPherson Agricultural Scholarship\*  
Benny McReynolds Memorial Scholarship  
Melton Art Scholarship\*  
Ruth Mershon Scholarship



Barbara J. Messenbaugh Strings Music Scholarship\*  
 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  
 Rick Nagel Family Scholarship for the Boys & Girls Club\*  
 Northwest Classen High School Class of 1956 Scholarship  
 P.B. Odom III Family Scholarship  
 OGE Energy Corp. Foundation Scholarship\*  
 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  
 Laurene Ann Opdyke Nursing Scholarship  
 Orner-Cook Scholarship  
 Deborah R. & Wayne A. Parker Scholarship  
 Patel Engineering Scholarship\*  
 Patel Math & Sciences 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  
 Flavious Richardson Scholarship\*  
 Larry W. Roach Leadership Award  
 Robyn's Way Scholarship  
 Jeffrey Rogers Education Memorial Scholarship  
 Anna-Faye Rose Scholarship  
 Mary Baker Rumsey Volunteer 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  
 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  
 St. James Catholic School Scholarships  
 -Albert & Freda Marottek Scholarship  
 -Lorene Sherman Memorial Scholarship  
 -Tracy Wilson Memorial Scholarship  
 Nevin & Beverly Starkey Edmond Kiwanis Club Scholarship\*  
 Pete & Lela Stavros Scholarship  
 Horace Stevenson Scholarship  
 Wendell Steward Scholarship  
 Jason Sublette Heart of a Leopard Memorial Scholarship  
 Survivors' Education Fund  
 Jim Thomas/Bertha Teague Scholarship  
 Roy Edward & Darlene Young Thornton Mid-Del High Schools 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

## Trustee Scholarships

*Additional scholarships in honor of the following past Trustees are awarded through our Trustee Scholarship Initiative or to support specific educational purposes designated by the Trustee.*

Jack Abernathy  
 Ray T. Anthony  
 J. Edward Barth  
 Mary Ann Bauman  
 John Belt  
 James C. Clark  
 Nancy Coats-Ashley  
 James R. Daniel  
 Steven C. Davis  
 Paul W. Dudman  
 Nancy Payne Ellis  
 Jean I. Everest  
 Jeanette Gamba  
 Sylvan Goldman  
 John E. Green  
 Kirkland Hall  
 Richard Harrison  
 Raymond Hefner Jr.  
 Dan Hogan III  
 James H. Holloman Jr.  
 Leslie Hudson  
 Jane Jayroe Gamble  
 William O. Johnstone  
 John E. Kirkpatrick  
 Linda Lambert  
 Judy Love  
 Steve Mason  
 Dean A. McGee  
 Frank McPherson  
 Harry Merson  
 Anne Morgan  
 J. Larry Nichols  
 Ronald J. Norick  
 Paul B. Odom Jr.  
 F.M. Petree  
 George Records  
 Clayton Rich  
 J.B. Saunders Jr.  
 William F. Shdeed  
 Richard L. Sias  
 James R. Tolbert III  
 Morrison G. Tucker

Dean Wild Memorial Scholarship  
 Deral E. Willis Scholarship  
 James M. Wilson Scholarship  
 Kang Yang Memorial Scholarship  
 Mildred & William Young Scholarship  
 Dan Zanowiak Memorial Scholarship  
 Guy G. & Ginger S. Zimmerman OU Scholarship

# Parks & Public Space Initiative

*The Oklahoma City Community Foundation has been invested in our city's parks and public spaces for many years. Since 1991, when the Margaret Annis Boys Trust was created to beautify public lands throughout central Oklahoma, we have awarded grants and provided hands-on expertise for landscaping improvements at hundreds of schools, neighborhoods and public parks. Today, the initiative continues to enhance our community by planting trees, improving parks and trails and making our public spaces more enjoyable for all residents.*

## Landscaping & Grounds Maintenance Workshop

Formerly known as Clean and Beautiful Schools Maintenance Networking Meeting, our Landscaping & Grounds Maintenance Workshop provides opportunities for public groundskeepers to learn about efficient and effective landscaping practices. Held twice each year, the free, half-day educational program benefits the maintenance personnel, volunteers and supervisors that maintain the grounds of our school campuses, parks, libraries, nonprofit properties, neighborhood greenbelts and other public spaces.

## Parks & Public Space Initiative/ Margaret Annis Boys Trust Grants

*The following grants were awarded during Fiscal Year 2018:*

**City of Bethany** – \$13,800 to plant trees in Eldon Lyon Park and Ripper Park through a parks improvement project for the city of Bethany.

**Gatewood Elementary** – \$10,310 for a shade structure and basketball goals to continue to activate the school grounds as a public park.

**Girl Scouts – Western Oklahoma** – \$26,000 to help develop a new urban camp facility on land adjacent to the Oklahoma City Zoo.

**John Marshall High School** – \$6,310 for phase two of a beautification project to plant trees at the Oklahoma City public high school.

**Metro Technology Centers** – \$9,100 to plant trees at the Springlake campus to help facilitate walking and wellness activities.

**Mid-Del Public Schools** – \$7,000 for playground improvement at Epperly Heights Elementary to facilitate student activities and activate the space as a public park for the surrounding community.

**Millwood Elementary School** – \$20,611 to plant trees and add soccer goals and a backstop to the campus creating a community and school recreation area.

**Oklahoma Christian University** – \$11,500 to plant trees along Oklahoma Christian University's Eagle Trail, which connects with the Edmond trails system, to encourage greater use of the trail by students and the surrounding community.


**Oklahoma City Community College** – \$12,000 to plant trees along walkways of the campus to further activate the space for students and the surrounding community.

**Venice Neighborhood Association** – \$9,000 to plant trees in public medians along Venice Boulevard in northwest Oklahoma City.

FY2018

**\$125,631** awarded to **10 projects**

[occf.org/parks](http://occf.org/parks)



Edmond residents and Oklahoma Christian University students walk along the newly planted trees on Eagle Trail, a 3.1 mile trail around the campus that connects with the Edmond trails system.

Photo by Brandon Sinder.

## Stepping Up Support of Community Trails

When Margaret Annis Boys entrusted her estate to the Oklahoma City Community Foundation in 1991, she began a crusade to enhance and activate every inch of our community's parks and public spaces.

Recently, our Parks & Public Space Initiative planted 40 trees along the east side of Eagle Trail in Edmond, Oklahoma. The trail winds through the campus at Oklahoma Christian University connecting to surrounding neighborhoods and is enjoyed by students and nearby residents alike.

Oklahoma Christian University president John deSteiguer is delighted with how the project turned out, saying it was, "an honor for the Community Foundation to make our park-like campus even more beautiful and usable for the community."

# Wellness Initiative

Health and wellness are powerfully influenced by where we live. Community access to safe places to play and exercise, nutritious food and other wellness resources directly impacts life expectancy and incidence of chronic disease among our citizens. Through our Wellness Initiative, the Oklahoma City Community Foundation is working with community partners to implement sustainable changes to improve these factors and make healthy living easier and more accessible in central Oklahoma.

## Central Oklahoma Wellness Alliance

A network of organizations that are invested in community health, the Central Oklahoma Wellness Alliance collaborated in 2018 to present free community education on issues including healthy aging, opioid abuse and backyard gardening for better nutrition.



Residents in central Oklahoma can find simple, affordable ways to get moving at [GetMovingOKC.org](http://GetMovingOKC.org). This free, mobile-friendly website features a calendar of local events and activities, public trails and parks, sports and recreational groups and wellness and nutrition resources.

# 5210

The OK5210 healthy living message was brought to central Oklahoma by the YMCA of Greater Oklahoma City and the Oklahoma City Community Foundation Wellness Initiative.

You can get moving toward a healthy lifestyle with these simple steps each day:

**5** or more fruits and vegetables

**2** hours or less of screen time

**1** hour or more of physical activity

**0** sugary beverages

## Wellness Initiative Grants

The following grants were awarded during Fiscal Year 2018:

**Among Friends Norman** – \$5,600 to fund daily health and wellness classes for adults with disabilities and additional needs.

**Healthy Schools Oklahoma** – \$20,000 to expand their early childhood SPARK program that provides sports, play and active recreation to prekindergarten students in 20 Oklahoma City metro-area elementary schools.

**Infant Crisis Services** – \$12,500 for the Nutrition Education for Healthy Beginnings, Healthy Lifetimes – a monthly nutrition class for low-income parents.

**INTEGRIS Foundation** – \$40,000 to expand the INTEGRIS Community Wellness Fit Club to offer additional free fitness classes for senior adults at Crossings Community Center.

**Latino Community Development Agency** – \$15,000 for a family health and wellness program for Latino youth and adults at risk for lifestyle-related diseases.

**Metro Technology Centers** – \$10,000 to provide free MetroFit youth fitness and nutrition classes at Metro Tech Northeast Campus.

**Metropolitan Better Living Center** – \$10,000 for health and wellness classes for seniors and caregivers in the northeast quadrant of Oklahoma City.

**Oklahoma Bicycle Society** – \$17,180 for a bike skills and safety training program for central Oklahoma residents.

**OIC - Opportunities Industrialization Center** – \$14,000 for the Heads Over Meals Project, a health and wellness class for low-literacy adult learners and those who work with them.

**Rainbow Fleet** – \$22,000 to continue training for child care professionals to integrate health and wellness activities that promote good nutrition and physical activity for children.

**ReMerge of Oklahoma County** – \$12,000 for biometric screening to supplement the ongoing health and wellness program tailored for high-risk women participating in the ReMerge diversion program.

**YMCA of Greater Oklahoma City** – \$3,475 to support the LIVESTRONG program that provides free wellness and fitness activities for cancer survivors.

## FY2018

**\$181,755** awarded to **12 organizations** [occf.org/wellnessinitiative](http://occf.org/wellnessinitiative)

## On the Road to Better Health

Bicycling can be a great way to include one hour of physical activity into your daily routine. Whether commuting to work or school, or just enjoying a ride around your neighborhood park, bicycling offers numerous benefits for both physical and mental health. Thanks to the Oklahoma Bicycle Society, Oklahomans of all ages now have greater access to learn basic bicycling skills. Through a grant from our Wellness Initiative, the group has trained 12 new instructors to teach a ‘Smart Cycling’ class, reaching more than 300 students this past year.

“I look forward to helping children and adults learn safe and effective bicycling skills to encourage healthy, active lifestyles,” said instructor John McClure.

# iFunds

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 \$3.2 million to charitable organizations serving central Oklahoma.

The following grants were awarded during Fiscal Year 2018:

## Access to Health Care Grants - \$124,500 awarded

**Community Health Centers** - \$40,000 to provide free clinical breast exams and breast cancer screenings to women who are not eligible for state and federally-funded programs.

**Dentists for the Disabled and Elderly in Need of Treatment (D-DENT)** - \$12,000 to support free restorative dental care provided by a network of volunteer dentists for individuals who do not have access to care.

**Good Shepherd Ministries of Oklahoma** - \$40,000 to provide free dental care services to Open Arms Clinic's patients.

**Health Alliance for the Uninsured** - \$15,000 to assist a campaign that will provide free colorectal cancer screenings and follow-up treatments for low-income, uninsured, at-risk persons.

**Oklahoma Caring Foundation** - \$5,000 for the OKC Metro Caring Van's outreach program to Hispanic youth providing free vaccinations and immunizations.

**Parkinson Foundation of Oklahoma** - \$12,500 to support the Ageless Grace wellness program that provides free fitness classes promoting healthy longevity of the body and mind for Parkinson patients in the OKC metro area.

## Services for the Elderly Grants - \$146,190 awarded

**Edmond Mobile Meals** - \$4,400 to provide meals to homebound elderly residents in the Edmond area.

**Meals on Wheels of Norman** - \$4,400 to provide meals to homebound elderly residents in the Norman area.

**Metropolitan Better Living Center** - \$15,000 to provide transportation for adult day care clients to the MBLC facility, medical appointments, wellness activities and other community programs.

**Mobile Meals of Oklahoma County** - \$56,600 to 57 churches in central Oklahoma to provide meals to homebound elderly residents.

**Oklahoma City Ballet** - \$10,790 awarded to the Golden Swans and Dance for Parkinson's programs that provide free ballet classes to help improve senior mobility.

**Rebuilding Together OKC** - \$15,000 to assist low-income, elderly homeowners with critical maintenance and repairs for a safe living environment.

**The Salvation Army** - \$20,000 to support the Senior Watch program providing services to keep seniors independent and self-sufficient.

**Sunbeam Family Services** - \$20,000 for the Senior Companion Program, which connects active, able-bodied seniors with homebound seniors to provide daily support and interaction.

## Opportunities for Children - \$188,606 awarded

**Arts Council Oklahoma City** - \$9,050 for the All Access Arts after-school program to provide arts education in two Oklahoma City public schools.

**Beta Eta Lambda Scholarship Foundation** - \$5,000 for robotics camp for Alpha Boys Institute serving young boys in northeast Oklahoma City.

**Boy Scouts of America - Last Frontier Council** - \$20,000 for recruitment of new urban Cub Scout Packs.

**Citizens Caring for Children** - \$15,000 to provide clothes, books and other supplies for foster children through the Resource Center.

**El Sistema Oklahoma** - \$15,000 to provide after-school music education for Oklahoma City-area students.

**Genesis Project** - \$10,000 to provide social and cultural activities for children in DHS custody living at the group home.

**Girls Scouts - Western Oklahoma** - \$18,000 for recruitment of Girl Scouts and development of new troops.

**Hearts for Hearing Foundation** - \$15,841 for support group for hearing-impaired children.

**Oklahoma Children's Theatre** - \$15,000 for the Page to Stage literacy and arts program for kindergarten through fourth-grade students.

**Oklahoma City Museum of Art** - \$9,000 for arts outreach program for children in the St. Anthony Behavioral Medicine Center.

**Oklahoma Cleats for Kids** - \$10,000 for athletic shoes for children in need.

**Positive Tomorrows** - \$20,000 to expand extracurricular and after-school activities for pre-K students.

**Prairie Dance Theatre** - \$8,000 to expand the Youth Company to include dance camps and additional performance opportunities.

**Youth and Family Services, Inc. - El Reno** - \$18,715 for the Body, Mind and Spirit Recovery program for foster children.

## FY2018

**\$459,296** awarded for **28 programs**

[iFundOKC.org](http://iFundOKC.org)



Students at Prairie Queen Elementary School in southwest Oklahoma City enjoy free, after-school dance lessons provided by Prairie Dance Theatre.

## An Opportunity to Shine

Five, six, seven, eight – and they’re off! It’s time to move. It’s time to twirl. Faces light up because it’s dance day!

Half an hour once a week, Prairie Dance Theatre engages students’ bodies and minds through an introductory-level after-school dance program. For those students inspired to take things a step further, the after-school Youth Company provides program graduates with more advanced training. Thanks to an Opportunities for Children iFund grant, Youth Company can now provide more students with more time to dance – all at no cost to the students!

“We don’t have them for long, but they learn so much,” artistic director Tonya Kilburn said. “It’s incredible to watch the transformation and see their confidence grow.”

# Kirkpatrick Family Fund

*In the 2018 fiscal year the Kirkpatrick Family Fund, the largest affiliated fund at the Oklahoma City Community Foundation, initiated two significant undertakings that celebrate its cultural and historical interests in central Oklahoma.*

## Oklahoma City Ballet

John and Eleanor Kirkpatrick were integral to the 1963 formation of the Oklahoma City Civic Ballet, which today is known as the Oklahoma City Ballet.

In the fall of 2017, the Kirkpatrick Family Fund, in partnership with the Kirkpatrick Foundation and the Christian Keesee Charitable Trust, made a transformative gift to endow the future of the Oklahoma City Ballet. “The ballet is an organization my grandfather cared for a great deal,” said Christian Keesee, president of the Kirkpatrick Family Fund. “Its creation was really a partnership between him and Yvonne Choteau. Her husband, Miguel Terekov, worked very hard to support their ambitious undertaking at every opportunity. To pay tribute to their work, we are naming the executive directorship after my grandfather and the school after Yvonne. We feel this is a fitting way to bring the ballet forward, while keeping an eye on its rich past.”

The gift, totaling \$2 million, supported the purchase and renovation of the new dance center and secured the organization’s future through the establishment of the Oklahoma City Ballet Yvonne Chouteau School and the John Kirkpatrick Executive Director Endowment Funds at the Oklahoma City Community Foundation. In addition to these two new endowments, a matching endowment grant was provided to support the annual operations of the organization. The Kirkpatrick Family Fund is proud to support the state’s oldest ballet and its ambitious plans for ballet in Oklahoma.

## The Mollie Spencer Farm

The Kirkpatrick Family Farm, which Christian Keesee and his son Blake donated to the Kirkpatrick Family Fund in 2016, has been rebranded ‘The Mollie Spencer Farm.’ The 33-acre Spencer homestead was originally purchased in 1894 by Mollie Spencer, John Kirkpatrick’s maternal grandmother. Mollie’s husband, L.M. Spencer, and his brother, A.N. Spencer, founded the town of Yukon in 1891.

Rebranding provides the Kirkpatrick Family Fund the opportunity to revisit and celebrate the history of the farm and its contributions to the community of Yukon. The Mollie Spencer Farm continues to host community events such as the annual Chisholm Trail Festival. Groups including the Girl Scouts and Boy Scouts also make use of the property. During the 2017-18 school year, the Yukon Middle School was invited to pilot a program using the farm as a classroom for their science and environmental studies. The pilot was successful and the use of the farm will expand in the upcoming school year. Youth from the Boys and Girls Clubs of Oklahoma County had the opportunity to visit the farm and observe the garden and the changes that occurred over a period of several weeks. For many, this was their first time to see a working garden and to sample vegetables that in some cases were unfamiliar to them.

Another new program of the farm is the equine foster program in partnership with Blaze’s Tribute equine rescue. Visitors to the farm may catch a glimpse of rescued horses Ruby and Oso who have taken up residence at Mollie Spencer Farm.



Photo by Katie Kerr.

A Boys and Girls Clubs of Oklahoma County participant visiting The Mollie Spencer Farm in Yukon, Oklahoma.



# your legacy



Photo by Jana Carson

In 2017, the Kirkpatrick Family Fund, together with the Kirkpatrick Foundation and the Christian Keese Charitable Trust, made a transformative gift to endow the future of the Oklahoma City Ballet.

# Kirkpatrick Family Fund

## Large and General Operating Support Grants

*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 \$85 million through project, operating and endowment-building grants. The following is the list of nonprofits which received grants in FY2018.*

### Animals

- Fund for Animals** - \$25,000 for program support.
- Humane Society of the Pikes Peak Region** - \$35,000 for general operating support and veterinary outreach and rehabilitation.
- Humane Society of the United States** - \$25,000 for program support.
- Wildlife Conservation Society** - \$50,000 for program support.

### Arts and Humanities

- Allied Arts Foundation** - \$100,000 for the 2018 Campaign.
- Arts Council Oklahoma City** - \$30,000 for All Access Arts.
- Chinati Foundation** - \$10,000 for Chinati Weekend.
- Church in the Wildwood United Church of Christ** - \$32,330 to support the 2018 Green Box Arts Festival and A/V updates.
- Cultural Office of the Pikes Peak Region** - \$10,000 to build cultural participation with Peak Radar.
- Fine Arts Institute of Edmond** - \$20,000 for general operating support.
- Friends of the Battleship** - \$50,000 to support Lighting the Battleship North Carolina.
- Green Box Arts Project** - \$207,000 to support the 2018 Green Box Arts Festival.
- Harn Homestead** - \$30,000 for general operating support.
- Mid-America Arts Alliance** - \$10,000 for general operating support.
- Oklahoma Children's Theatre** - \$15,000 for general operating support.
- Oklahoma City Ballet** - \$1,700,000 for education programs, to establish the Yvonne Choteau School of Ballet Endowment, and to endow the John Kirkpatrick Executive Director Chair.
- Oklahoma Contemporary Arts Center** - \$1,766,000 for general operating support and planning.
- Oklahoma Historical Society/History Center** - \$74,000 to support the expenses associated with the Kirkpatrick Family Archive.
- Oklahoma Humanities Council** - \$30,000 to support the Let's Talk About It, Oklahoma program
- Oklahoma Museums Association** - \$15,000 for general operating support.
- Oklahoma Shakespeare in the Park** - \$25,000 for general operating support
- Oklahoma Visual Arts Coalition** - \$20,000 for general operating support.
- Oklahomans for the Arts Inc.** - \$85,000 for general operating support and strategic planning.
- Ormao Dance Company** - \$20,000 to support the 2018-2019 season.
- Paseo Artists Association** - \$20,000 for general operating support.
- Red Earth** - \$15,000 for general operating support.

### Children, Youth & Families

- Boys & Girls Clubs of Oklahoma County Inc.** - \$130,000 for the Great Futures Campaign.

- Center for Children and Families** - \$30,000 for general operating support.
- Citizens Caring for Children** - \$10,000 to support the resource center.
- Infant Crisis Services** - \$10,000 for general operating support.
- Parent Promise** - \$15,000 for general operating support.
- Pivot, Inc.** - \$20,000 for general operating support.
- Positive Tomorrows** - \$20,000 for general operating support.
- Special Care Incorporated** - \$25,000 for general operating support.
- Sunbeam Family Services** - \$35,000 to support the emergency senior shelter.
- The Urban Mission** - \$20,000 to support the Kids in Need Program.

### Community Development

- Executive Service Corps of Central Oklahoma** - \$25,000 for general operating support.
- Kirkpatrick Family Farm, Inc.** - \$294,000 for the Mollie Spencer Farm rebranding and for general operating support.
- McCall's Communities for Life Enrichment** - \$50,000 to support the adult day care center.
- Neighborhood Alliance of Central Oklahoma** - \$18,000 for general operating support.
- Oklahoma City Police Department** - \$19,100 for senior management training.
- Possibilities, Inc.** - \$15,000 for general operating support.
- Sallie Bush Community Building** - \$39,000 for building improvements.
- Town of Green Mountain Falls** - \$50,000 for the comprehensive plan.
- Yukon Community Support Foundation** - \$30,000 for 2018 City of Yukon special events.

### Education

- Community Literacy Centers** - \$10,000 for general operating support.
- KIPP Reach College Preparatory** - \$25,000 for library materials.
- Payne Education Center** - \$15,000 for general operating support.
- Teach for America** - \$25,000 to support the Oklahoma City corps.
- Ute Pass Elementary School** - \$75,000 for the Green Box Arts Children's Program.

### Environment

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

### Health

- Central Oklahoma American Indian Health Council** - \$18,120 to support teen pregnancy prevention.
- Dentists for the Disabled and Elderly in Need of Treatment** - \$30,000 to support the Restorative Care Program.
- Health Alliance for the Uninsured** - \$25,000 for general operating support.

**Integrus Foundation** - \$30,000 to support the Arcadia Trails Center for Addiction Recovery.  
**Oklahoma Medical Research Foundation** - \$25,000 for general support.  
**Planned Parenthood Great Plains** - \$120,000 to support teen pregnancy prevention.  
**Regional AIDS Intercommunity Network of Oklahoma** - \$15,000 for general operating support.  
**Teen emPower!** - \$60,000 to support teen pregnancy prevention.  
**THRIVE** - \$250,000 for general operating support.  
**Variety Care Foundation** - \$275,000 to support the Teen Pregnancy Prevention program.

### Social Services

**A Chance to Change Foundation** - \$25,000 for general operating support.  
**Be the Change** - \$10,000 to support the Ground Floor Pregnancy Prevention Initiative  
**Calm Waters Center for Children and Families** - \$15,000 for general operating support.

**Britvil Community Food Pantry** - \$15,000 for general operating support.  
**Center for Employment Opportunities** - \$10,000 to support job services for those with recent criminal convictions.  
**HeartLine, Inc.** - \$25,000 for general operating support.  
**Homeless Alliance** - \$15,000 to support community capacity building.  
**Metropolitan Better Living Center, Inc.** - \$35,000 for general operating support.  
**Neighborhood Services Organization** - \$10,000 to support the low-cost dental clinic.  
**Regional Food Bank of Oklahoma** - \$50,000 for general operating support.  
**ReMerge of Oklahoma County** - \$20,000 for general operating support.  
**The Education and Employment Ministry** - \$30,000 for general operating support.  
**United Way of Central Oklahoma** - \$150,000 for the 2017 Annual Campaign.  
**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 2018. The dollar amount listed is the Kirkpatrick Family Fund's match amount.*

### Arts & Humanities

Allied Arts Foundation	\$8,000
Edmond Historical Society	\$500
Friends of Libraries in Oklahoma	\$2,000
Frontier Country Historical Society	\$8,500
Oklahoma City Ballet	\$150,000
Oklahoma's International Bluegrass Festival	\$700
Oklahoma Military Hall of Fame Foundation	\$500
Oklahoma City Philharmonic	\$230,000
Oklahoma Railway Museum	\$10,000
Pottawatomie County Historical Society	\$15,000

### Children, Youth & Families

Center of Family Love	\$15,000
Lions Meadows of Hope	\$83,000
Neighborhood Services Organization	\$2,000
Oklahoma Baptist Homes for Children	\$20,000
YMCA of Greater Oklahoma City	\$6,500

### Community Development

Crown Heights-Edgemere Heights Neighborhood Association	\$3,000
Executive Service Corps of Central Oklahoma	\$2,000
Myriad Gardens Foundation	\$33,000
Warriors for Freedom	\$15,000
World Neighbors	\$20,000

### Education

Deer Creek Schools Foundation	\$25,000
El Reno Public School Foundation	\$8,500
Mid-Del Public Schools Foundation	\$7,000
Moore Public Schools Foundation	\$20,000
Mount St. Mary High School	\$16,500
OCU Meinders Business Economic Research Center	\$20,000
Oklahoma Christian School	\$20,000
Opportunities Industrialization Center	\$2,500
St. Mary's Episcopal School	\$1,500
Women of the South	\$33,000

### Health

Epilepsy Foundation Oklahoma	\$500
Fundación Manos Juntas	\$20,000
Oklahoma Caring Foundation	\$2,500

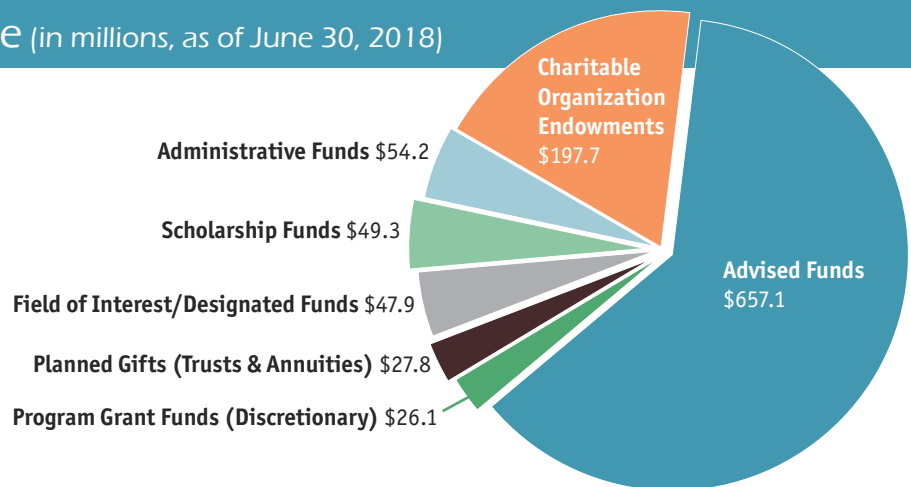
### Social Services

Edmond Mobile Meals	\$20,000
Homeless Alliance	\$15,000
Jesus House	\$10,000
Skyline Urban Ministry	\$8,500

# Financial Highlights Unaudited

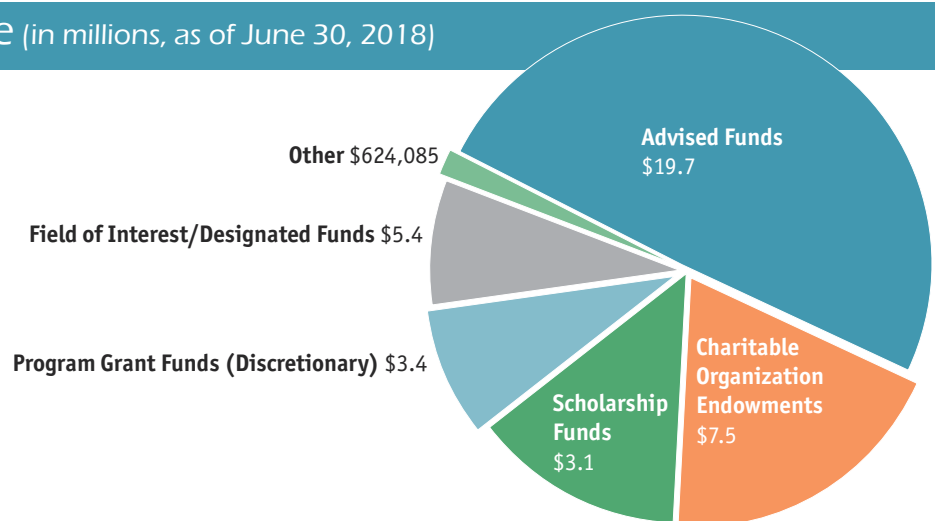
## Total Assets \$ 1.06 billion

Assets by Fund Type (in millions, as of June 30, 2018)



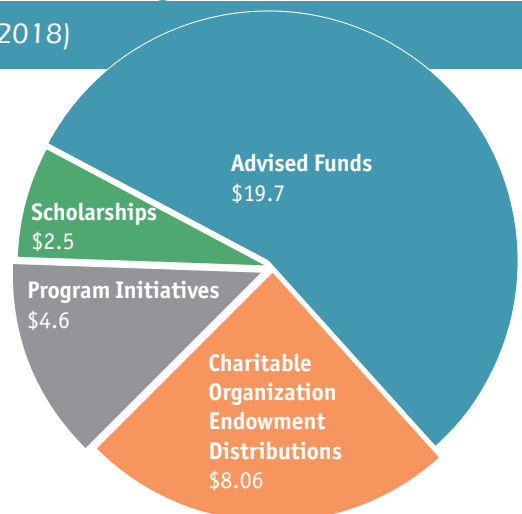
## Total Gifts from Donors \$39.7 million

Gifts by Fund Type (in millions, as of June 30, 2018)



## Total Grants Distributed to the Community \$34.9 million

Grants by Fund Type (in millions, as of June 30, 2018)



Note: Gift and grant amounts include interfund gifts and grants, as well as reciprocal transfers that are excluded from audit and financial summary amounts.

# Investment Management

The Oklahoma City Community Foundation's primary investment objective is to prudently manage charitable assets to achieve long-term growth and provide sustainable distributions to charity. Allocation decisions, investment portfolios and performance are reviewed quarterly by the Investment Committee and our Investment Counsel. As of July 1, 2018, two new investment options are available for certain funds. See page 2 for more information.

## Asset Allocation

The general investment pool maintains a diversified portfolio that includes exposure to higher return asset classes, as well as non-correlated investments. During Fiscal Year 2018, the general pool's tactical asset allocations increased equity exposure and decreased targeted fixed income allocation in an effort to grow potential, future net returns.

## General Investment Pool Asset Allocation at July 1, 2018



## Distributions

Annual distributions are calculated using 5 percent of the fund's average market value for the previous 12 quarters as of March 31.

## Investment Counsel

Jack Marringa, United Capital Financial Advisors, LLC

## Investment Managers

Aberdeen Asset Management  
BlackRock  
Earnest Partners, LLC  
JP Morgan Chase Asset Management

## Investment Committee

See page 62

Learn more at [occf.org/investmentmanagement](http://occf.org/investmentmanagement).

# Fiscal Year 2018 Investment Performance

Pooled Investments as of June 30, 2018

	FY2018 7/1-6/30	Three Years	Five Years	10 Years *
<b>EQUITIES</b>				
Oklahoma City Community Foundation	14.05%	10.49%	11.96%	8.94%
S&P 500	14.37%	11.93%	13.42%	10.17%
MSCI ACWI	11.31%	8.78%	10.00%	6.37%
<b>FIXED INCOME</b>				
Oklahoma City Community Foundation	-0.33%	1.04%	1.49%	3.11%
Barclays Capital Govt./Credit Intermediate A+	-0.40%	1.72%	2.27%	3.72%
<b>ALTERNATIVES</b>				
Oklahoma City Community Foundation	-1.29%	**	**	**
<b>TOTAL RETURN</b>				
<b>Oklahoma City Community Foundation</b>	<b>7.80%</b>	<b>6.66%</b>	<b>7.69%</b>	<b>6.78%</b>
50% Russell3000/15% MSCI ACWI/ 35% Barclays Capital G/C Int (Note A)	8.25%	7.23%	8.39%	7.10%
65% S&P500/35% Barclays Capital G/C Int (Note B)	9.08%	8.39%	9.53%	8.15%

\* All periods ending 6/30/18 \*\*Alternative asset class was funded during FY17.

Note A: Equity performance is compared to the Russell 3000 stock index and the MSCI ACWI exUS 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 Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these two indices.

# Consolidated Statements of Financial Position

\*2018 numbers unaudited

	June 30, 2018	June 30, 2017
<b>ASSETS</b>		
Cash	\$ 2,495,077	\$ 3,811,188
Accrued income	781,253	753,750
Investments:		
Cash equivalent funds and securities	944,017,063	876,611,068
Real estate, limited partnerships and other	68,589,944	64,392,716
Contributions receivable and beneficial interest in trusts	28,652,765	22,341,021
Property and equipment	17,366,176	12,613,922
Other assets	2,679,122	2,656,831
<b>TOTAL ASSETS</b>	<b>\$1,064,581,400</b>	<b>\$ 983,180,496</b>
<b>LIABILITIES</b>		
Grants and program services payable	\$ 13,742,146	\$ 13,450,963
Annuity contracts payable	2,789,683	2,672,316
Other liabilities	3,141,687	2,848,355
Charitable funds held for the benefit of other organizations	109,477,441	102,381,492
<b>TOTAL LIABILITIES</b>	<b>\$ 129,150,957</b>	<b>\$ 121,353,126</b>
<b>NET ASSETS</b>		
Unrestricted	\$ 222,470,715	\$ 203,049,200
Temporarily restricted	712,959,728	658,778,170
<b>TOTAL NET ASSETS</b>	<b>935,430,443</b>	<b>861,827,370</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$1,064,581,400</b>	<b>\$ 983,180,496</b>

# Consolidated Statements of Activities

\*2018 numbers unaudited

	June 30, 2018	June 30, 2017
<b>REVENUES AND SUPPORT</b>		
Contributions	\$ 32,263,621	\$ 81,642,928
Investment income	15,542,396	11,083,385
Net investment gains (losses)	63,201,196	69,350,871
Change in value of split-interest agreements	2,616,590	1,198,612
Administrative fees and other income	508,285	456,144
<b>TOTAL REVENUES AND SUPPORT</b>	<b>\$ 114,132,088</b>	<b>\$ 163,731,940</b>
<b>EXPENSES AND DISTRIBUTIONS</b>		
Grants and program services	\$ 32,717,608	\$ 34,629,934
Investment expenses and management fees	3,426,670	3,145,366
General and administrative	3,627,764	3,353,601
Development	756,973	757,166
<b>TOTAL EXPENSES AND DISTRIBUTIONS</b>	<b>\$ 40,529,015</b>	<b>\$ 41,886,067</b>
CHANGE IN NET ASSETS	\$ 73,603,073	\$ 121,845,873
NET ASSETS AT BEGINNING OF YEAR	861,827,370	739,981,497
<b>NET ASSETS AT END OF YEAR</b>	<b>\$ 935,430,443</b>	<b>\$ 861,827,370</b>

*Our annual independent audit report and the related audited consolidated financial statements with footnotes will be available on our website, [www.occf.org](http://www.occf.org), after November 30, 2018.*

# Volunteer Committees

The individuals listed below volunteered their time and expertise to serve on the following committees during July 1, 2017-June 30, 2018.

## Audit Committee

*Provides oversight on annual audit process.*

Scott Spradling, *Chair*  
Mike Collison  
Bob Dilg  
Eddie Ditzler  
Mark Funke  
Bob Slovacek  
J. Eugene Torbett

## Charitable Organization Endowment Program Committee

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

Ann Johnstone, *Chair*  
Steven C. Agee  
Tina Burdett  
Brenda Granger  
Mo Grotjohn  
Oscar Jackson  
Paul Moore

## Executive Committee

*Provides administrative and management oversight. All committee members served as Trustees during Fiscal Year 2018.*

Bond Payne, *Chair*  
Steven C. Agee  
Mike Collison  
Oscar Jackson  
Jenny Love Meyer  
Tony Tyler

## iFund Grant Review Committees

*Reviews and provides input on iFund grant programs.*

### Opportunities for Children

Leigh Ann Albers  
Ray Bitsche  
David Gorham  
Jennifer Stewart  
Alison Taylor  
Tony Tyler

### Access to Health Care and Services for Elderly

Leigh Ann Albers  
Kelley Barnes  
Linda Brinkworth  
Shirley Cox  
Keith Kleszynski  
Helen Stone  
Jennifer Thurman

## Investment Committee

*Oversees investment management and selects investment managers.*

Steven C. Agee, *Chair* (through June 30, 2018)  
Mike Collison, *Chair* (beginning July 1, 2018)  
Martha Burger  
Steven C. Davis  
Mo Grotjohn  
Kirkland Hall  
Edward Krei  
Bond Payne  
Laura Ratliff  
J. Edward Barth, ex officio  
Paul Dudman, ex officio  
James H. Holloman Jr., ex officio  
Christian K. Keesee, ex officio

## Margaret Annis Boys Trust/Parks & Public Space Initiative

*Reviews and provides input on public parks and beautification projects.*

Leslie Hudson, *Chair*  
Steven C. Agee  
Sam Bowman  
Bill Gumerson  
Vicki Howard  
Elaine Lyons  
Rodd Moesel  
Georgie Rasco  
Jane Sutter  
Pete White  
Renate Wiggin  
Marsha Funk, ex officio

## Trustee Scholarship Initiative Committee

*Provides oversight for the Trustee Scholarship Initiative programs.*

Oscar Jackson, *Chair*  
Nolan Coyle  
Kim Garrett Funk  
Pat Kelly  
Jessica Martinez-Brooks  
Anita May  
Judge Vicki Miles-LaGrange  
Diane Ming  
D.J. Morgan  
Gary Salwierak  
Ashley Stevenson

## Wellness Initiative Committee

*Provides oversight on program and grant requests.*

Colleen Dame  
Talita DeNegri  
Carol Hopper  
Jonas Mata  
Steve Petty  
Alicia Salvatore  
Steve Schlegel  
Tracey Strader  
Ashley Weedn



# Trustees

The Oklahoma City Community Foundation 15-member Board of Trustees includes local civic and business leaders who volunteer their time to help govern our policies, administration, activities and grant decisions. Nominated for three-year terms, Trustees can serve up to nine consecutive years.



**Bond Payne, Chair (Through June 30, 2018)**  
Chairman, Heritage Trust Company



**Steven C. Agee, Ph.D., Chair (As of July 1, 2018)**  
Dean, Meinders School of Business,  
Oklahoma City University



**T. Scott Spradling, Treasurer**  
Attorney, Hartzog Conger Cason & Neville



**Leigh Ann Albers**  
Community Volunteer  
(Term began July 1, 2018)



**Mike Collison**  
Vice President & CFO,  
The Oklahoma Publishing Company



**Talita DeNegri**  
Principal, Mount St. Mary Catholic  
High School



**David J. Feroli**  
Partner (retired), KPMG, LLP  
(Term began July 1, 2018)



**Mark W. Funke**  
CEO & President, Southwest Bancorp.



**Leslie Hudson**  
Community Volunteer  
(Term ended June 30, 2018)



**Oscar Jackson**  
Secretary of Human Resources &  
Administration, State of Oklahoma  
(retired)



**Ann Johnstone**  
Community Volunteer



**Edward A. Krei**  
Bank Consultant



**Jenny Love Meyer**  
Love's Travel Stops & Country Stores



**Vicki Miles-LaGrange**  
U.S. District Judge, Western District  
of Oklahoma



**Christin V. Mugg**  
Attorney, Mugg Scott & Winston  
(Term began July 1, 2018)



**P.B. Odom III**  
P.B. Odom III Land Development  
Companies



**Tony Tyler**  
Tyler Media  
(Term ended June 30, 2018)



**Christian K. Keesee**  
Chairman, Kirkpatrick Bank  
*ex officio*



**Nancy B. Anthony**  
President



**Rhonda Godwin**  
Vice President, Administration  
Assistant Secretary



**Cathy Lippard**  
Controller  
Assistant Treasurer



**Steven C. Davis**  
Attorney, Hartzog Conger Cason & Neville  
General Counsel & Secretary

# 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.



**Megan Hornbeek Allen**  
Director, Scholarship Programs  
405/606-2917



**Nancy B. Anthony**  
President  
405/606-2900



**Kelley Barnes**  
Director, Community Engagement  
405/606-2942



**Lauren Barnes**  
Coordinator, Communications  
405/606-2932



**Tina Burdett**  
Senior Program Officer, Kirkpatrick Family Fund  
405/767-3702



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



**Joe Carter**  
Vice President, Development  
405/606-2914



**Kenneth Conklin**  
Development & Donor Services  
405/606-2926



**Brian Dougherty**  
Director, Parks & Public Spaces  
405/606-2908



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



**Ashley Elkins**  
Special Projects Coordinator  
405/606-2939



**Rick Fernandez**  
Coordinator, Central Oklahoma Guidance Counselor Network  
405/606-2919



**Kasey Gardner**  
Manager, Communications & Publications  
405/606-2922



**Diane Gboné**  
Human Resources Coordinator  
405/606-2983



**Rhonda Godwin**  
Vice President, Administration  
405/606-2916



**Athena Grossman**  
Grants and Information Specialist, Kirkpatrick Family Fund  
405/767-3702



**Donna Harless**  
Accounting Support  
405/606-2925



**Carol Hopper**  
Accounting & Donor Services  
405/606-2903



**Caseyna Jones**  
Office Manager  
405/606-2911



**Shree Ledford**  
Grants and Program Support  
405/606-2950



**Cathy Lippard**  
Controller  
405/606-2915



**Jennifer Meckling**  
Director, Charitable Organization Endowment Program  
405/606-2951



**Wanda Minter**  
Scholarship Administrator  
405/606-2907



**Laura Moon**  
Donor Services Coordinator  
405/606-2929



**Rachel Mouton**  
Charitable Organization Endowment/ GiveSmartOKC Administrator  
405/606-2918



**Emma Newberry-Davis**  
Programs Manager, Kirkpatrick Family Fund  
405/767-3702



**June Owens**  
Accounting Services  
405/606-2937



**Tiffany Peterson**  
Fund Accountant  
405/606-2906



**Anna-Faye Rose**  
Program Services  
405/606-2902



**Emily Sabo**  
Archivist  
405/606-2913



**Bill Schmid**  
Facility Maintenance  
405/606-2931



**Joel Schwartz**  
Director, Information Technology  
405/606-2901



**Andrew Shepard**  
Development Associate  
405/606-2927



**Nancy Stearns**  
Office Manager, Kirkpatrick Family Fund  
405/767-3702



**Jana Steelman**  
Director, Communications  
405/606-2941



**Jennifer Stewart**  
Director, Donor Services  
405/606-2912



**Helen Stone**  
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](mailto:info@occf.org).

 [www.occf.org](http://www.occf.org)

 [youtube.com/occforg](https://youtube.com/occforg)

 [givesmartokc.org](http://givesmartokc.org)

 [okccommunityfoundation](https://www.instagram.com/okccommunityfoundation)

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

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COMMUNITY FOUNDATION**

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