



OKLAHOMA CITY  
COMMUNITY FOUNDATION



2021

ANNUAL REPORT



MEETING THE NEEDS  
IN OUR COMMUNITY



Fiscal Year 2021  
**At a Glance**

2021  
Incoming Donor Gifts

**\$135,932,807**

2021  
Total Grants

**\$45,065,955**



\$2,795,400  
Scholarships

\$198,524  
Disaster Relief

\$27,244,671  
Donor Advised Funds

\$4,464,393  
Program Initiatives

\$10,362,967  
Charitable  
Organization Endowments

**\$31,800,000**

**Grants**

into and for the benefit  
of the community

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**\$10,400,000 to**

**Nonprofits**

through our Charitable  
Organization  
Endowment Program

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**\$2,800,000**

**Scholarships**

awarded to 821 students  
through our Scholarship  
Program

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## OUR MISSION

The mission of the Oklahoma City Community Foundation, a nonprofit public charity, is to serve the charitable purposes of its donors and the charitable needs of the Oklahoma City area through the development and administration of endowment and other charitable funds with the goal of preserving capital and enhancing value.

## OUR GOALS

- Provide convenient, efficient and effective ways through which donors can contribute assets to charitable purposes.
- Encourage donors to create funds that will benefit the community both now and in the future.
- Advocate for the development of endowment funds and provide appropriate means by which permanent endowment funds can be built and wisely managed to provide long-term support.
- Develop restricted and unrestricted community endowments which shall be used to develop, facilitate, coordinate and enhance services that meet the changing needs of the community.





# Long-Range Planning & Short-Term Goals

It's been a year of near-constant change, impacting our lives and the lives of those around the world in countless ways. Fiscal year 2021 began in the midst of a pandemic prompting people and workplaces to look for a new normal – all while adapting to a changing society. The stories and reports in this annual report document how the Oklahoma City Community Foundation faced the challenge and met the changing needs of our community. As the economy began to recover, we tackled those needs head-on, awarding grants and taking advantage of extraordinary investment returns. This will be a period remembered for its challenges and it will be remembered for its successes. It will be remembered.

In early 2020, the Oklahoma City Community Foundation Trustees initiated a long-range planning process. When the pandemic shut things down a couple months later, it created many needs and opportunities for philanthropy to emerge as an important resource for immediate and strategic assistance to our citizens. Knowing the community and world would be changed by these events gave a new outlook to the planning activities that broadened the perspective of the Trustees about the current and future role the Oklahoma City Community Foundation might play. The outstanding investment performance and resulting endowment fund growth reinforced their plan, giving an added emphasis to the impact donors can have and the role these endowments play in providing long-term support for charitable organizations.

The Trustees' plan for the organization upheld the mission of the Oklahoma City Community Foundation and affirmed three key elements: the importance of endowment, meeting the changing needs of the community and serving as a community leader.

First, we will continue to serve the charitable purposes of donors and the community by the development and

administration of endowments to preserve capital and enhance value. As a major philanthropic resource, the Community Foundation provides donors with the opportunity to achieve their charitable goals efficiently and effectively. We will maintain and expand our services to donors to continue to help them impact both Oklahoma City and communities throughout the state.

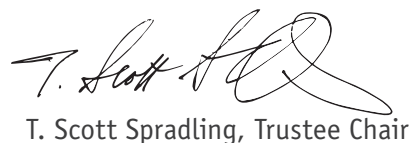
Next, we will use the restricted and unrestricted community endowments to coordinate and enhance services that meet the changing needs of the community. If the past year has taught us nothing else, we've learned the community will change and opportunities to serve will evolve. We will continually review our programs and work with donors to understand these changes so our endowments serve future opportunities as well as the current needs.

Finally, we strive to be enlightened leaders with a forward-thinking perspective of community issues and opportunities. Our 50-year involvement in endowment building, scholarship development and efficient donor service represents the consistent and dedicated commitment needed for permanent and sustainable impact. We will continue to work with donors and charitable organizations to build these endowments to create everlasting support that will impact our community in perpetuity.

In many ways, fiscal year 2021 was the beginning of the Community Foundation's second 50 years. While the events of the past year were unusual and unexpected, they presented an opportunity to think about the future in a way that provided insight into real change we needed to consider. With this new perspective, the Oklahoma City Community Foundation Trustees and staff will go forward knowing we have both the resources and the opportunities to meet the changing needs of the community.



Nancy B. Anthony, President



T. Scott Spradling, Trustee Chair

# Making a Difference by Meeting the Need

Think bigger, take risks and reimagine what is possible. It is with this mindset that Oklahoma City philanthropist, and highly involved civic leader, Sue Ann Arnall set out to make lasting and transformative change in our community.

Founded by Sue Ann in 2015, the Arnall Family Foundation has worked in tandem with public and private agencies to effect change in the worlds of child welfare and criminal justice. By balancing their support of proven and effective approaches with new strategies and ideas, they have made great strides with great success in their first five years.

Inspired by this progress, they joined forces with local officials and community stakeholders in 2018 to take concrete steps to combat criminal justice trends. From this effort, the Diversion Hub was born. This innovative program opened its doors in June 2020 to provide a comprehensive, one-stop network to assist justice-involved individuals with life-stabilizing resources and empower them to reduce their encounters with the criminal justice system. By partnering with the Kirkpatrick Family Fund to establish an endowment at the Oklahoma City Community Foundation, a fund was created to provide long-lasting resources for the Diversion Hub. With this step, the Arnall Family Foundation further solidified its support for criminal justice reform.

But for this changemaker, it still wasn't enough. Sue Ann recognized an opportunity to do more, and through a new partnership with the Oklahoma City Community Foundation, the Arnall Family Foundation is poised to do just that.

In early 2021, Sue Ann established the Arnall Community Funds at the Community Foundation, leveraging the strengths of both organizations to



Sue Ann Arnall

distribute funds more quickly and efficiently over the next five years.

"The Oklahoma City Community Foundation has more than 50 years of experience in supporting charitable causes in our state," Sue Ann said. "By partnering with them, we have been able to expand our impact and quickly deploy funds to empower community partners to create lasting and transformative improvements."

The collaborative relationship the Community Foundation and the Arnall Family Foundation have developed has brought out the strengths of both organizations, taking advantage of the Community Foundation's administrative support and asset management experience while allowing the Arnall Family Foundation to focus on program development and fostering community relationships.

"The Arnall Family Foundation is addressing some of our community's greatest challenges and giving opportunities to many individuals who might not have much," Nancy Anthony, president of the Oklahoma City Community Foundation said. "This partnership brings to life our founder, Mr. Kirkpatrick's, vision of how the Community Foundation can help individuals fulfill their charitable goals, and we look forward to what we can accomplish together."

In June, the Arnall Community Funds awarded seven Oklahoma charities nearly \$3 million through their inaugural grants.

"We are excited and encouraged by the organizations we have already had the opportunity to work with and look forward to many more as we partner with the Community Foundation to make a stronger and more vibrant community," Sue Ann said.



Pictured are four of the seven Oklahoma charities that received nearly \$3 million from the Arnall Community Funds' inaugural grants in June.



RestoreOKC



Oklahoma Humane Society



Heartline Oklahoma





# Special Donors

Cumulative gifts of \$500,000 or more to permanent endowment funds.

*Listed with date established.*

## **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.

## **Arnall Family Foundation | 2019**

Sue Ann Arnall started several funds at the Community Foundation to expand the Arnall Family Foundation's community work advocating for children involved in foster care and the juvenile justice system.

## **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.

## **John & Jennifer Bird | 2020**

This couple's gifts benefit the Oklahoma FFA Foundation Anderson Endowment Fund, established to support the Carl C. Anderson Innovator Awards honoring Oklahoma FFA Star Students.

## **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 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.

## **James D. & LaVerna L. Cobb | 2009**

A U.S. Marine veteran and Oklahoma State University alumnus, Jim Cobb was a passionate supporter of OSU and a leading engineer in the state of Oklahoma. He and his wife, LaVerna, established the James D. & LaVerna L. Cobb Scholarship to support students attending the OSU School of Civil and Environmental Engineering.

## **Jacqueline B. Cook | 2014**

Longtime social worker Jacque Cook served as a professor in the Department of Family and Preventive Medicine at the University of Oklahoma Health Sciences Center, where she coordinated residency rotation of Behavioral and Community Medicine. In 2014, she established an advised fund to benefit Cavett Kids Foundation, which was further funded following her death in 2018.

## **Tom Criswell | 2016**

Businessman and owner of Criswell Funeral Home in Ada, Oklahoma, Tom Criswell established a fund to support charitable causes in his community.

## **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 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.

## **Bob Funk | 2020**

An agricultural businessman, Bob Funk has been crucial to our state's agricultural development. Established in 2020, this gift supports the Oklahoma Youth Expo endowment fund.



### **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.

### **Kathleen S. Hahn | 2019**

An Oklahoma City native, Kathy Hahn established the Elaine Hahn Memorial Business Scholarship and Elaine Hahn Memorial Business Scholarship for Upperclassmen in memory of her sister and her love for helping others. Through a legacy fund, she also supports her charitable interests in the community.

### **Chuck & Kay Harrison | 2019**

Co-founder of Sonic's largest franchisee group, Chuck was passionate about his business, earning the nickname "Mr. Sonic." Following Chuck's death in 2019, his wife, Kay, donated a life insurance policy to the Community Foundation to support their charitable interests.

### **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.

### **John Lurieve & Suzanne Jarvis | 2020**

Longtime educator Suzanne Jarvis retired from her role as lead teacher in special education from Oklahoma City Public Schools in 2007. As a teacher, Suzanne felt it was important for students to have access to the arts. She left a gift in her estate to support art education as well as the beautification of parks.

### **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.

### **Bobby & Donna Knapp | 2012**

Col. Bobby and Donna Knapp traveled the world with the U.S. Air Force and fell in love with Oklahoma City along the way. In 2012, the couple established a scholarship in honor of Donna's love of music. They later established an advised fund to support their charitable interests, which was further funded through a gift in their estate.

### **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.

### **Lions Club of Oklahoma City Downtown | 1998**

One of the seven Lions Club International founder clubs, the Lions Club of Oklahoma City Downtown had a long, proud history of service to the community. When the club disbanded in 2020, they established this fund to continue their legacy of service and support scholarships for Oklahoma high school students.

### **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 & 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.

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

### **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.

### **David L. Murphy Family | 2019**

Oil and gas businessman David Murphy was an influential leader and mentor to many. In 2019, he established the David L. Murphy Family Legacy Fund to support his many charitable interests and solidify his legacy as a leader in the community.

### **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 P. 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.

### **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.

### **Piyush & Lisa Patel Family | 2015**

Entrepreneurs and founders of Digital-Tutors, Piyush and Lisa Patel established an advised fund in 2015 to support causes important to their family. In 2019, they established the Patel Family Scholarship for students participating in the Redlands Community College TRIO Upward Bound program.

### **William T. Payne Fund | 1976**

A successful Oklahoma City oilman, 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 The Bachelor's Club Fund and various charitable organizations including The Education and Employment Ministry (TEEM).

### **Dr. Jonathan Schwartz | 2020**

One of the leading physicians in sleep medicine in Oklahoma, Dr. Schwartz left a gift in his estate to establish three scholarship funds as well as a legacy fund to continue to support his charitable interests.

### **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.

### **Dr. Leonard & Lisa Slater | 1998**

The couple established this fund to support their many charitable interests. It was further funded through a gift of an IRA.

### **R. Emery & Mary Lee Smiser | 1996**

Oklahoma City residents R. Emery and Mary Lee Smiser established an advised fund to support a variety of charitable interests important to their family.

### **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.

### **Bill & Joan Yinger | 1997**

Successful Oklahoma City oilman, Bill and wife, Joan, established an advised fund at the Community Foundation to support "the homeless, the hungry and all who are unable to meet their individual and family needs." They expanded their support of these and other charitable interests through gifts in their estate.

### **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.



Donors Ed and Sherri Miller discuss their advised fund with Community Foundation Vice President of Development Joe Carter.

## Creating a Legacy to Meet the Need

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

### Legacy Fund

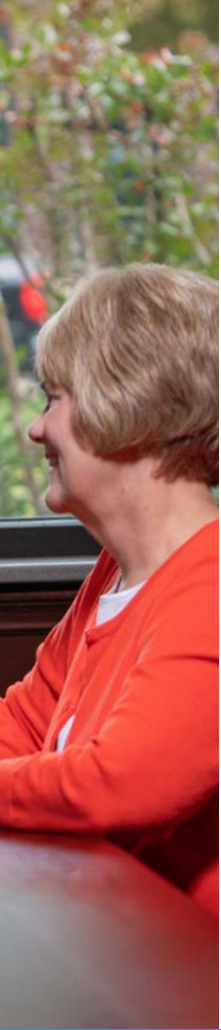
- Great alternative to a private foundation.
- Minimum initial gift of \$20,000.
- Permanent endowment fund allowing you to grant 5% annually to qualified charities.
- Earns investment returns.
- Ability to name successor advisors.

### 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.



# A Lasting Legacy



Ed and Sherri Miller have spent a lifetime giving back to their community. Through their church and local Rotary, they have supported and cultivated their passion for the arts and education, and through the Oklahoma City Community Foundation, they hope to soon expand their support.

Last year, the Millers started looking for a way to ensure their gifts continue to impact generations to come. The answer came in the form of a legacy fund at the Oklahoma City Community Foundation.

“It was actually my financial planner who suggested I consider OCCF,” Ed said. “I was familiar with the name, but I was totally unaware of how much OCCF does and gives back. They could offer us tax benefits, the ability to leave a lasting legacy for our family and the opportunity to give back to the community that gave so much to us.”

Through their legacy fund at the Community Foundation, the Millers were able to donate gifts of stock and real estate to create a permanent fund that allows them to award grants to support their charitable interests and carry on their legacy.

Ed and Sherri were so impressed with the Community Foundation, they recruited Ed’s brother and sister-in-law, John and Joyce Fetrow, to establish an advised fund.

“It’s been so easy dealing with the Community Foundation and working together as a team,” Ed said. “I would encourage anyone that wants to leave a mark on Oklahoma to visit with them.”

## 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 legacy.

405-235-5603

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

# Family Affiliated Funds

Affiliated funds are considered supporting organizations of the Oklahoma City Community Foundation. Established with a minimum of \$1 million, these funds operate under separate governing documents and trustees.

*Listed with year of initial gift.*

## **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 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 the late John Holliman, former Professor Emeritus of Pathology at the University of Oklahoma Health Sciences Center, viewed the world as their community. Through their fund, Claudia continues to support 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 510 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 their support of the community, including Perry Public Schools, the Noble County YMCA and economic development projects for the City of Perry.

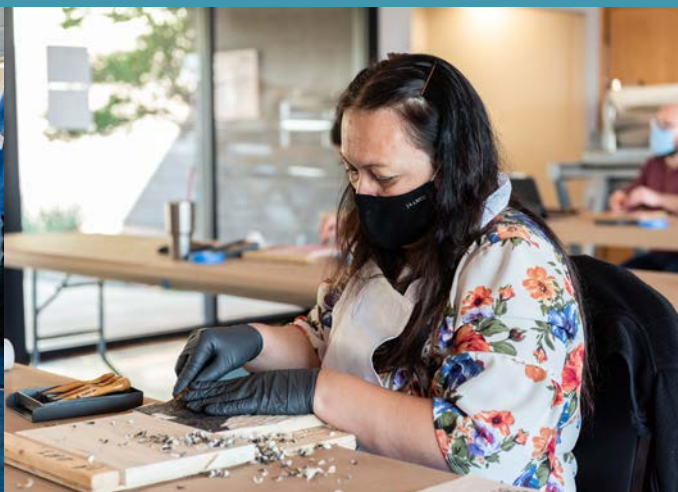
## **Janice & Joe L. Singer Family Affiliated Fund | 2004**

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 was married for 55 years. Through the fund, the Vogt family continues to support the couple's charitable interests.





Earlier this fall, six students were able to explore their passion for the arts with the help of scholarships from the Albers Family Affiliated Fund for the 2021 Oklahoma Fall Arts Institute.

## Community Affiliated Funds

Affiliated funds are considered supporting organizations of the Oklahoma City Community Foundation. Established with a minimum of \$1 million, these funds operate under separate governing documents and trustees.

*Listed with year of initial gift.*

### 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 \$6.9 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).

# Benefactors

Cumulative gifts of \$10,000 or more to advised funds and endowments of \$10,000 or more.

\* Indicates fiscal 2021 gift

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# A Sound Investment for Today and Tomorrow

Growing up in rural Oklahoma, community involvement was a way of life for Cynda Ottaway. As she grew into adulthood and completed law school, she knew she wanted to continue to make a difference in her own way.

Cynda has served in leadership roles for several charitable organizations over the years, most recently as board chair for the Oklahoma City Museum of Art where she has made it a personal goal to help build their endowment as a funding base.

In her professional life, she works directly with families and family businesses, taking a personal interest in helping them plan for the future. It was through her clients that Cynda was first introduced to the Oklahoma City Community Foundation.

Over the years, Cynda has participated in trainings, attended continuing education workshops and worked hand in hand with Community Foundation staff to ensure her clients' charitable goals are achieved.

"Working with the Community Foundation, I came to trust that my clients' funds were well taken care of," Cynda said. "It's a well-run organization with good accountability and investment return and great staff."

In 2020, when Cynda and her husband, Larry, were determining how to handle a highly appreciated stock, they turned to the Community Foundation. With their newly established Ottaway Family Fund, they were able to take advantage of a charitable tax deduction and move toward supporting the community in the long term.

"We found the Community Foundation was a great fit for our family," Cynda said. "Their fund flexibility allows us to take our time figuring out exactly how and where we want to help. In the meantime, I know the money is there, well-cared for and a sound investment."





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Oklahoma City Museum of Art Trustee Cynda Ottaway and her husband, Larry, explore one of the museum's many exhibits.



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Dilip & Vibha Patel\*  
Pathways Child Development Center  
Dorothy Norick Patton & Wilbur Patton  
Guy & Caroline Patton  
Dorothy A. Paul  
Col. (USMCR-Ret) & Mrs. Homer Paul  
Mr. & Mrs. William G. Paul  
Stephen B. Payne Memorial Fund  
PEEPS for Oklahoma Public School  
Orchestras Fund  
Olga Pellow  
Raina & Stan Pelofsky  
Eddie & Beth Perkins Family  
Almeda G. Pflieger  
Bill Phillips\*  
Marion & Marvyl Phillips  
Pick Family Fund  
Randy & Peggy Pickle\*  
Carla & Nelson Pickrell  
Dr. Lori Pickrell\*  
Liz Picone\*  
Peter G. & Virginia M. Pierce  
Alice & Phil Pippin\*  
Plater Family Fund  
Jami Poor\*  
Ray & Pat Potts  
Mark Wayne & Brenda Gayle Powell  
Alice Pratt  
Gregory Price  
L. Keith Price Family Legacy Fund

## Q

Quail Creek Bank  
Frederick & Jayne Quellmalz

## R

David & Kim Rainbolt  
H.E. Rainbolt  
James L. Rainey  
Dr. Raniyah Ramadan Foundation  
Robert Glenn Rapp Foundation  
Francis & Mary Rardin Foundation  
Robert & Judith Raulston  
Edison A. & Helen Reber  
George J. & Nancy Records\*  
Dr. John Records Memorial Fund  
Stephen & Megan Rector  
Jerry A. Reed  
Sharline Reedy  
Eloise Rodkey Rees  
Ken & Gae Rees Family\*  
Steven & Rhonda Regier  
Treva M. Reimink  
Rental Concepts  
Margaret K. Replogle  
Reynolds Family Foundation  
Allie P. Reynolds  
Charles Lee & Jana Lea Reynolds

Donald W. Reynolds Foundation  
Maxey & Norman Reynolds  
Warren Rice Memorial Fund  
Mr. & Mrs. W.T. Richardson  
John & Cheryl Rickards\*  
Clyde A. Riggs Memorial\*  
Olive Rist Trust  
Sister Hildegard Roan Memorial Fund  
Kendra Robben & Brandon Lewis  
Mr. & Mrs. Bob Roberts  
Clarence & Beulah Roberts  
John D. Robertson  
Paul Michael Rockne Memorial Fund  
Elizabeth A. Rolan  
John & Velma Roring  
Rosary Home & School Association  
David & Anna-Faye Rose\*  
John C. Ross  
Julian J. Rothbaum  
Marcus C. & Elizabeth A. Rowland  
Rozin-Funk Pancreatic Cancer Research Fund  
RSM US LLP  
Judy Ruby-Brown  
Mr. & Mrs. Joseph F. Rumsey  
Edward J. Ruscha\*  
Russell Family Heritage Fund  
Dr. Bob Rutledge

## S

St. Francis of Assisi Catholic Church  
St. Gregory's University  
St. John Missionary Baptist Church/Waltine  
Lynette Jackson  
St. John's Episcopal School  
Ryan Samples Family  
Sarkeys Foundation  
J.B. Saunders  
J.B. Saunders III  
Robert C. Saunders  
Leonard H. Savage  
Kermit Schafer/Braden Park, L.L.C.  
Steve & Elizabeth Schatz  
Bill & Kim Schlittler\*  
William J. Schme Memorial Fund  
Harold & Betty Schmid  
Robert & Mary Schmid\*  
Milton H. Schonwald  
Pat & Fred Schonwald Jr.\*  
Charles & Alleyne Schweinle  
Bill Schwertfeger  
Willard & Lucille Scott  
Scott-Husband Fund  
Steve & Becki Seay  
Helen Sedlmeir  
Lee & Janice Segell  
Seligson Flower Fund  
Seminoff, Bowman & Associates  
George & Sharon Seminoff  
Serving Towel Fund  
Gregory L. Shadid Memorial Scholarship Fund\*  
Ben & Shirley Shanker  
Logan & Donna Sharpe\*

Joseph R. Shaw Foundation  
 William F. & Pam Shdeed\*  
 John & Mary Sue Shelley  
 Phyllis T. Shelton  
 Donna Sherman  
 Carrie Shirk Memorial/Lucyl Shirk  
 George H. Shirk  
 Natalie Shirley  
 Boyd Shook  
 Carl & Beth Shortt  
 R.L. Sias\*  
 Tracy & Suzanne Silvester  
 Simmons Charitable Foundation\*  
 Sherri & Si Simon  
 Linda Simonton & Tom Rueb\*  
 Ann Gordon Singer  
 Morris & Libby Singer Foundation  
 Paul L. & Helen I. Sisk Charitable Trust  
 Albert & Shirley Skalovsky\*  
 Skirvin Hotel/Marcus Corporation Foundation  
 Leonard & Lisa Slater\*  
 Stanley & Shirley Slater  
 Smith & Kernke Funeral Homes & Crematory  
 Joe B. Smith Trust  
 Lenardo Smith\*  
 Paul & Lillyanne Smith  
 Philip E. & Vivian S. Smith  
 Ruby Mae Smith  
 Earl & Cornelia Sneed  
 Francis C. Sneed Charitable Trust  
 Stephen Somach  
 Soroptimist Club of Oklahoma City  
 Mary Sosa Memorial Fund\*  
 Robert H. & Linnie Spahn  
 Melvin & Dena Spencer  
 T. Scott & Suzanne S. Spradling\*  
 Mr. & Mrs. E.M. Stanley  
 Stephen L. Stark Memorial Fund  
 Charles & Peggy Stephenson Family  
 Foundation  
 Horace Stevenson\*  
 Roy P. & June W. Stewart  
 Stifel, Nicolaus & Company  
 Virgil Stout  
 Terry & Annette Stowers  
 Mary Deane Streich\*  
 Charles & Lois Stuart  
 Harold C. & Joan S. Stuart Foundation  
 Mrs. R.T. Stuart  
 Sugar Creek Camp  
 Rose Karchmer Sugerman Memorial Fund  
 Fern Sullivan  
 Carol Daube Sutton  
 Dr. George Miksch Sutton  
 Frank Swan  
 Richard E. & Geneva T. Swan  
 Mr. & Mrs. M.A. Swatek Memorial Fund  
 Bill & Wanda Swisher  
 Tom Swyden  
 Don R. & Mary Louise Symcox

**T**  
 Richard G. Taft Jr. Memorial Fund  
 William H. Taft Memorial Fund  
 James W. Taira  
 Janet M. Taliaferro  
 Richard & Glenna Tanenbaum\*  
 Tarpai Emese Mind, Body & Spirit Fund  
 John W. & Jo Tarr  
 Marilyn Taylor\*  
 R. Clark & Jane Taylor  
 Roy & Jo Thein  
 Paul T. Theisen  
 J. Edwin, Laura, Ross & Jim Thomas  
 Family Trust  
 Mr. & Mrs. Jimmie C. Thomas  
 Michael C. Thomas Family  
 Ronald E. & Sharon W. Thomas  
 Jerry M. Thomason  
 Roy & Darlene Thornton\*  
 Beth & James R. Tolbert III  
 J. Eugene & Marilyn Torbett  
 W.G. "Bill" & Marsha A. Townsend  
 Jack D. & Evelyn B. Trachtenberg  
 Larry & Mary Trachtenberg  
 Guy B. & Louise Treat  
 T-Stone, LLC\*  
 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**  
 George J. Vaclavek  
 Mr. & Mrs. Lawrence V. Van Horn  
 David Van Meter  
 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**  
 James & Catherine Waldo  
 John & Marsha Waldo  
 Charles Scott Waldrop  
 Ward Petroleum Corporation  
 Ron & Cindy Ward\*  
 Robert & Shirley Wasserman  
 Waste Connections\*  
 Watershed Animal Fund  
 Wes & Elizabeth Lou Watkins

Dr. O. Alton & Dorothy Watson  
 Herman & Mary Wegener Foundation  
 Dwight & Peggy Wehr  
 Molly & Paul Wehrenberg  
 A. Kurt Weiss Lectureship  
 Marvin A. & Martha Weiss  
 Robert & Tammy Weiss\*  
 Carmalieta & Dan Wells  
 Bill & Lucy K. Westerheide Fund  
 Jerome Westheimer  
 Leah & Larry Westmoreland  
 Jane Wheeler/Small Wheel Fund\*  
 Pete & Lynne White\*  
 Whitney Family  
 Kenneth R. & Diana G. Wickham  
 Kathleen Wilcox  
 Robert E. & Viola M. Wild  
 Ben C. & Addie Mae Wileman  
 Susan H. & Kenneth R. Wiley  
 Darryl & Kim Wilkerson  
 Sherril & Viola J. Williams  
 Tracey & Jeff Wills\*  
 Florence Ogden Wilson  
 Brig. Gen. William Rex Wilson  
 Harold & Carolyn Wittrock\*  
 Gustave R. Woerz Trust  
 Dorothea Wolfe  
 Roy G. & Alta Woods Memorial Fund  
 Electra Marie Woody  
 Betty Wooldridge\*  
 Paul S. & Conna D. Woolsey\*  
 Tom & Jane Ann Workman  
 Allen & Jacque Wright\*  
 Joshua & Jennifer Wright\*  
 Muriel H. Wright Heritage  
 D. & C. Wygant  
 Hosie C. Wynne

**Y**  
 M. Blake Yaffe  
 Ann Boulton Young  
 Carol Elizabeth Young

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





Volunteers prepare hot meals for seniors at Edmond Mobile Meals, a charitable organization especially important to Omar and Karen Janjua.



Omar & Karen Janjua

# Feeding the Need

“When we first came to Oklahoma, I didn’t know anything about the state,” Omar Janjua said. “But, working at Sonic, I had the opportunity to participate in their outreach programs and become more involved in the community, and I grew to love it.”

A veteran of the food industry, Janjua spent more than four decades building and leading fast-food chains, specializing in everything from slinging burgers to fulfilling late-night pizza and taco cravings. While Omar’s career took him and his wife, Karen, all around the country, Oklahoma held a special spot in their hearts. In 2019, they returned to Oklahoma City with plans to make a difference in the community.

“The Community Foundation came highly recommended from a friend of ours,” Omar said. “It was a good way for us to make sure our money stayed local and connected

to the community, and it offered us the tax benefits we were looking for.”

Through their new fund at the Community Foundation, Omar and Karen have already supported several causes, taking a particular interest in making sure people have food to eat. In addition to their financial support, Karen volunteers for Edmond Mobile Meals, where she helps provide seniors with a nourishing meal and daily contact, allowing them to remain independent and in their own homes.

As their relationship with the Community Foundation has blossomed, Omar and Karen have begun to see more ways to make a difference and plan to continue to replenish their fund, take advantage of the charitable tax deductions and impact the community.

# In the Business of Making a Difference

Dec. 31, 2020, was a day worth celebrating for Josh and Jenny Wright. After six years developing and operating iScout – an app that helps companies report workplace incidents to OSHA – Josh and his business partners sold the company.

While they had been offered a deal and had been working out details of the sale for months, the actual sale was anything but definite.

“The offer expired on Dec. 31, but going into work that morning, I would have guessed the chances of it actually going through were about 50/50,” Josh said. “Then, by mid-day it was final, and it was a whirlwind after that.”

With just a few hours before the new year and a sudden influx of income, Josh and Jenny had a lot of decisions that needed to be made quickly. Knowing they wanted to use a portion of the sale to donate and take advantage of the tax benefits that would offer, they began making calls.

Enter the Oklahoma City Community Foundation. After seeing the low fund fees, tax advantages offered and ability to defer selecting organizations to grant funds to, they knew it was the solution they were looking for. For the rest of the day, they worked with Joe Carter to fill out paperwork, figure out wire transfers and get everything squared away.

“I was so impressed that Joe spent his New Year’s Eve helping us. Those details aren’t my strong suit, so having an expert make sure all the I’s were dotted and T’s were crossed was really helpful,” Josh said. “We’re not sure what we want to support yet, but one of the great things about this fund is while we decide, it is growing so we can make a bigger impact.”

## Choose What to Give

Nearly any asset can be converted into cash for charitable purposes, often with tax saving benefits. Whether you are planning your estate, succession or business sale, or year-end gifting strategies, we can assist you in limiting your tax liability relating to capital gains.

- **Cash Gifts**  
Cash contributions may be in the form of cash, check, money order or cashier’s check, and mailed to: Oklahoma City Community Foundation, PO Box 1146, Oklahoma City, OK 73101-1146
- **Credit Cards**  
Visit [donate.occf.org](https://donate.occf.org) for secure online giving. Give one time, or set up recurring gifts.
- **IRA Charitable Rollover**  
Even though required minimum distributions from a traditional IRA do not start until age 72, you can begin making charitable distributions up to \$100,000 at 70 ½.
- **Real Estate**  
Land, vacation homes, commercial properties and primary residences offer a variety of gifting opportunities.
- **Business-related Assets**  
Gifting a portion or all of a privately held C-Corp, S-Corp, LLC or limited partnership can be an efficient tax planning strategy.
- **Retirement Plan Assets**  
Naming OCCF as a beneficiary of a 401(k), 403(b), traditional IRA, SEP or any other type of qualified retirement plan can be the most tax-efficient asset to gift at death.
- **Securities**  
Stock, bonds and mutual funds are a very effective asset to gift.
- **Life Insurance**  
Gift a fully-funded policy during lifetime or name the Foundation as a beneficiary.
- **Other Assets**  
Copyrights, royalties, patents and oil and gas interests.





After the sale of a company, Josh & Jenny Wright look for a way to make a difference in the community

## When to Give

Take advantage of a number of gift planning tools offered. The experienced staff at the OCCF will work with you and your team of advisors to include a charitable gift from your family, business or estate plan.

- **Bequest**  
The most popular type of planned gift whereas a provision is made in a will or trust to gift a portion if not all of an estate for the benefit of a fund or to establish a fund.
- **Termination of Private Foundation**  
If you are tired of keeping up with the compliance and administrative duties of running a private foundation, consider converting to a fund at the OCCF.
- **Charitable Gift Annuity**  
Make a tax-deductible gift now in exchange for a lifetime income stream with the remainder going to a fund at a later date.
- **Charitable Remainder Trust**  
Use this tax strategy to minimize tax consequences on highly appreciated assets while still receiving an income stream for life or a stated period of time with the principal going to a fund at the OCCF.
- **Charitable Lead Trust**  
This can be used to generate a charitable deduction upon receiving a windfall or used as an estate planning tool to minimize estate taxes. After the trust term ends, the remainder returns to either the donor or family, depending on the type of trust.

# Major Donors

Cumulative gifts of \$1,000 to \$9,999 to permanent endowment funds and current fiscal year gifts.

Linda (Lippert) & David Alaback	Brett & Tracy Dick	Larry Keigwin	Joel & Dorothy Schwartz
Steve & Twynell Alford	Tashella Dickerson	Tim & Phyllis Kersey	Christopher Shadid
American Plant Products & Services	John Doddy	Jeffrey D. Knipe Charitable Fund	Derek Shadid
Arvest Bank	Douglass High School Class of 1971	KTKKT LLC/Cox Family	Hal Smith
Ron & Julie Arvine	Downtown Club of Oklahoma City	Steven & Tracy Labahn	Toni & Ken Snow
Troy & Diane M. Baker	Frederick Ford Drummond	Elizabeth Lambird Youngblood	Southeastern Electric Cooperative
Bank of Oklahoma Foundation	Mike & Amy Dunn	Neal & Joni Lane	Thomas P. Stafford
Kelley N. Barnes	Durant Elks Lodge	Bob & Joan LaRue	Edwin J. Stahl Jr.
Patricia Barnes	Doug & Tish Eason	David & Beverly Laughead	Stephens-Zeiler Family
William & Sherry Beasley	Elizabeth K. Eickman	Theresa Lee	Kathleen & Tom Stevenson
Clarence & Marsha Beatty	Michael & Judy Elliott	Lester Family Foundation	Jennifer & Dale Stewart
Roderick Becker	William Elliott	Lilac, LLC dba DiplomaSender	Helen Stone
David Behm	Gerald Emmerich	Samantha Marley-Harrod	Shirley Summers
Rita L. Benischek	Sue & Joe Esco Fund	Jane Elizabeth Massey	Paul Sund & Claudia San Pedro
Bob & Debbie Blackburn	Jay Paul & Barbara Farber	Patrice Mathews & Mark Wunsch	Mary Surbeck
Lisa Blackburn	Lorien Faulkner & Karen Martin-Faulkner	Richard Maxon	Clayton & Marnie Taylor
Jeff & Lori Blumenthal	Peter & Felice Feldman	Molly & Mark McBride	Texoma MFG LLC
David & Lynne Bock	Sally & Don Ferrell	John & Penny McCaleb	Udho & Dorothy Thadani
Helen Hayes Bondurant	Martha Ferretti	Merlin McDonald	James Thompson
Harold & Carole Bourlon	Suzanne Fiaccone	William & Juliana McIntosh	Ralph & Barbara Thompson
Linda Brinkworth	First United Bank & Trust Company	David & Jean McLaughlin	Jeffrey & Debbie Trachtenberg
Barbara Brown	Michael Freeman	Christina McQuiston	Pam Troup
C. Arnold & Patricia Brown	Mark & Carol Gale	Marilyn Mendenhall	Charles Turpin
Robert & Zelda Brown	Mitchell & Kendra Gammons	Charles & Laurie Mettry	Turpin Family Foundation Fund
Vance Brown	Gena Gardiner	Chris & Laura Mitchel	UPT Family Fund
Brown-Dugger Funeral Services	Linda Garrett	Anne Morgan	Donna Kennedy Vogel
CAC Financial Corp	Carolyn Glasgow Crepps	Adrian & Taylor Mullaly	Joseph & Elizabeth Waner
Mary Gilmore Caffrey	Jeff Glasgow	Nichols Energy Services	Barbara Fox Wieland
Cathy & Geoffrey Canty	Mike & Gail Grady	Oklahoma City Firefighters Association	Joe & Melinda Wilhite
Cardinal Glass Durant	Andrew & Judi Gregory Family Foundation	Oklahoma Institute for Child Advocacy	Virginia Wilhite
Cherokee Communications	Jay Gregston	Oklahoma State Firefighters Women's Auxiliary	Amber Williams
Choctaw Nation of Oklahoma	William D. Gumerson Jr. Memorial Fund	Sherrill Pallotta	Kathryn Williams
Citizens Advisory Committee- Children's Volunteer League	Dina Hammam	J. Phillip Patterson	Lola M. Wilmes
Donald M. & Yvonne Clark	Sandra Harrison	Russell Perry	
Linda A. Clement	John & Melvena Heisch	John Pettis	
Mary Coates	Frank D. & Bette Jo Hill	Ronald & Sarah Pool	
Commercial Metals Company	JoAnn Holden	Lee & Miriam Powell	
Janet & William Cook II	Erin Holloman Scott	Pruett's Food	
Timothy & Jane Cook	Juanita Holsinger	John & Sharon Reeves	
Laura J. Cooke	Terry & Jann Hook	Marvin & Linda Resnick	
Robert & Diane Cooke	K.R. & Lois Hornbrook	Drake & Luellen Rice	
Kevin Cooper	Karen & John Hudgens	RNR Cross Family Foundation	
Teresa Cooper	Randal Ice	Harold W. Roberts	
Mr. & Mrs. Nolan Coyle	Insurance Professionals of Central Oklahoma	Roll-Offs of America	
Edwin D. Crane	Michael & Cindy Johnson	Sager Foundation Fund	
Bob Curtis	Don & Teresa Kastens	Alan Sandgarten	
Jim R. Daniel		Robin Scarberry	
Bruce & Patty DeFriese		J.B. Schuelein	
Rowland & Mary Denman			



# In Memoriam • July 1, 2020 – June 30, 2021

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

## **Guy M. Anthony Jr.** (1946 - 2021)

A U.S. Marine and Vietnam veteran, Guy Anthony spent nearly 20 years living in Taiwan and Korea using his language skills and cultural knowledge as manager of the Asian imports leg of the C.R. Anthony Company, his family's chain of clothing stores. After returning to the United States, he began a second career as owner and manager of Hydro-Tone, a water fitness equipment company. Following his death, friends and family established a memorial fund in his honor.

## **Steven L. Barghols** (1951 - 2020)

Oklahoma City attorney Steven L. Barghols spent more than four decades as a preeminent mediator and arbitrator, mentoring and guiding young lawyers. But, it was his leadership at the Oklahoma County Bar Association, Edmond Public Schools Foundation and countless other organizations for which he will be most remembered. His legacy will continue through the Steven L. Barghols Family Fund.

## **Jack Canine** (1932 - 2020)

A lover of ragtime music, Jack Canine's passion for the banjo permeated every aspect of his life. As the inventor of the TerraKnife and the leader in the manufacturing of liquid handling products, he named his company Banjo Corporation, and in 1999, he donated over 200 rare banjos to establish the American Banjo Museum in Oklahoma City. The American Banjo Museum Jack Canine Endowment Fund at the Community Foundation will ensure his legacy of support will continue in perpetuity.

## **Carol Yvonne Cannon** (1934 - 2020)

A graduate of Central State College, Yvonne Cannon made counseling and working with American Indian students her life's work, and she took that mission to heart. Through her estate, she established the Julie, Rob, and Yvonne Cannon Legacy Fund to ensure that her legacy will continue to impact future generations.

## **William Charles Dungan** (1934 - 2021)

Charles Dungan loved his family, work and community. A hard-working, honest and religious man, he strove to make a difference for others in all that he did. His legacy of generosity will continue through several funds, including the H.F. & Mary Ellen Virgin Scholarship he and his wife, Ann, established with her sister.

## **Josephine Wyndham Freede** (1927 - 2020)

A native of Plymouth, England, Jose Freede embraced her adopted state as her own, supporting a number of civic causes and the arts, as well as endowed chairs and scholarships at Oklahoma City University and the University of Oklahoma. She will be remembered for her charm, wit and generosity to the community.

## **William Dow Gumerson Jr.** (1944 - 2020)

A consummate gentleman, Bill Gumerson spent his career designing, building and restoring some of the finest architecture in Oklahoma. He was a long-time member of the OCCF Parks Initiative Committee in addition to serving on a number of boards helping preserve historically significant properties. Following his death, friends and family established the William D. Gumerson Jr. Memorial Fund to perpetuate his legacy.

## **Patty Howry Cochrane** (1951 - 2021)

A lover of numbers and papers, Patty Howry devoted her career to banking, finance and accounting. When she joined the Daughters of the American Revolution, she combined her love of serving the community with the skills she'd built for decades, serving as treasurer for the next eight years. During her tenure, she championed the task of developing endowment funds for many chapters of the DAR.

## **Donna Vandiver Knapp** (1936 - 2021)

For Donna Knapp, music was her life. She spent years teaching music in elementary and high schools across the country by day and giving private piano lessons and singing in church choirs by night. In 2012, Donna and her husband, Bobby, established the Donna Vandiver Knapp Piano and Vocal Music Education Fund to support music students at the University of Oklahoma.

## **Harry Koelsch** (1922 - 2020)

A retired member of the Sheet Metal Workers Local #124 Union, Harry Koelsch and his wife, Rosemary, led a life based on honesty, faith and family. When their daughter Valerie was killed in the Murrah Federal Building bombing, Harry's union established a scholarship fund in her memory. In 2005, the couple established a legacy fund at the Community Foundation to support charitable causes important to them.

## **Donna J. Kornbaum** (1922 - 2021)

Donna Kornbaum spent her life traveling the world by train, plane and ship, setting the trend in travel with her husband, Harry, as the founders of Rainbow Travel Services. Donna stayed active in retirement arranging a weekly Ladies Coffee with a speaker and other events at Epworth Villa in Oklahoma City. In 2002, she established her first of many funds at the Community Foundation to support her many charitable interests.

## **Karen Lee Leonard** (1942 - 2020)

A master domestic engineer, Karen Leonard led a life of caring and sharing, devoting time to her children, their activities and the community. For more than 20 years, she volunteered for Skyline Urban Ministry's pantry, Edmond Mobile Meals and many other charitable organizations. Her legacy of generosity will continue through the Joe and Karen Leonard Charitable Fund.

**James Cray Meade**  
(1927 - 2020)

Oil and gas businessman James Meade made Meade Energy Corporation an industry leader, becoming instrumental in the development of the Arkoma Basin at the height of his career. It was his ability to engage intelligently on any topic that made him a passionate supporter of art, history and education. His love of art and avid support of the Oklahoma City Art Museum will live on through a fund he established at the Community Foundation to support acquisitions.

**Jacqueline K. Medley**  
(1932 - 2020)

A registered nurse by trade, Jackie Medley loved to stay busy. She was constantly entertaining, traveling, participating in one of her many social groups or volunteering with Christ the King Catholic Church. Her support of the Rev. Kenneth King Memorial Scholarship and Martha King Scholarship will perpetuate her passion for religion and the value of education for years to come.

**William "Bill" Joseph Medley**  
(1930 - 2020)

Bill Medley knew how to live life and live it well. As a businessman, he transformed his family business from a two-man operation to more than 100 employees with six locations. He threw himself into his church and community service, volunteering with the Uptown Kiwanis, Regional Food Bank of Oklahoma and much more. His zest for travel took him around the world and his passion for learning led him to support scholarships at the Community Foundation, ensuring his legacy continues for generations.

**David L. Murphy**  
(1938 - 2021)

Oil and gas businessman David Murphy was an influential leader and mentor to many in both his professional and personal life. In 2019, he established the David L. Murphy Family Legacy Fund to support his many charitable interests and solidify his legacy as a leader in the community.

**Donald Eugene Ramsey**  
(1928-2020)

Nobody believed in the future of agriculture more than Don Ramsey. While teaching vocational agriculture, he began processing his student's hogs and making sausage to sell to the community as an FFA fundraiser. That's how the Blue & Gold Sausage Company was born. The company was successful beyond his wildest imagination, allowing him to support the community and create a charitable legacy that will continue through the Ramsey Family/Blue & Gold Sausage Fund.

**David Eugene Salter**  
(1949 - 2020)

An oil and gas landman, David Salter's life was guided by his faith and love for people. He devoted his time to serving his church in a variety of ways and volunteering in the community. The Lloyd-Salter Family Fund, which he established with his family, will continue to support the causes he cared about most.

**Jonathan Schwartz**  
(1956-2020)

A leading Oklahoma physician in sleep medicine, Dr. Jonathan Schwartz helped establish the Sleep Disorder Center of Oklahoma and was instrumental in opening Baptist Community Clinic, one of the largest free all volunteer clinics in the state. Through a gift in his estate, Dr. Schwartz established three scholarship funds and a legacy fund to continue to support his charitable interests.

**Terry Simmons**  
(1947 - 2021)

Terry Simmons had big dreams and the work ethic to make them happen. With the help of his mentor, Chip, he worked his way from sweeping the floors to the owner of Reel-O-Matic, growing his generosity toward others as he grew in his career. His legacy of giving and community support will live on through The Chip Fund, which he established to support his many charitable interests.

**Steven Clark Surbeck**  
(1946 - 2020)

Longtime Casady School teacher and coach, Steven Surbeck was passionate about literature, teaching and the outdoors. He spent countless hours volunteering at St. George's Guild and Children's Hospital where he could be found cuddling premature newborns. His legacy of generosity will continue through his support of the Oklahoma City Metro Literacy - Mary Surbeck Literacy Fund.

**Jack Edward Turner**  
(1928 - 2021)

Family businessman Jack Turner worked alongside his father as co-owner of Turner Bros. Trucking Co. and oversaw farm and cattle operations on the multigeneration family ranch. For more than 70 years, he volunteered his time and energy to St. Luke's Methodist Church and community organizations tackling the issues of addiction and mental health. The Jack and Jeanine Turner Fund will continue to support the causes he cared about most.

**Jean Warren**  
(1932 - 2020)

Jean Warren's greatest joys in life were her children, but serving her community came in a close second. As a member of the board for numerous organizations, she bolstered awareness and helped bring about change, particularly impacting the areas of education, the arts and physical and mental wellness.

**Ron Yordi**  
(1944 - 2020)

Owner and president of Yordi Construction Company, Ron Yordi served on an endless list of charitable organizations and honed his skills as a member of the inaugural class of Leadership Oklahoma. He never tired of lending his time and energy to anyone in need and was a mentor to many. His charitable legacy will continue through the Ron and Judy Yordi Fund he and his wife established.





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

# Miriam Freedman (1925-2021)

Growing up in Muskogee, Oklahoma, Miriam Freedman learned the value of education and giving back from her mother and stepfather, Roberta and Phil Kirschner.

After marrying and moving to Dallas with her husband, Raymond, Miriam began living out these ideals for herself. She spent her days studying and working toward her bachelor's in social work and later a master's in art history. Meanwhile, she spent her free time volunteering at Temple Emanuel, mentoring troubled adolescents and working with the League of Women Voters and Women's Division of the Jewish Welfare Federation, as well as many other organizations.

Following her stepfather's death in 1981, the Kirschner Trusts were established to continue his philanthropic endeavors. Miriam and her husband returned to Muskogee to assist her mother with administering these five charitable trusts, a role she took over entirely when her mother passed in 1985.

For more than 30 years, Miriam administered the Kirschner Trusts, supporting Honor Heights Park, scholarships, single women returning to the workforce, children with disabilities and training for Jewish students to become spiritual leaders. But in typical Miriam style, she found her own way to make a difference as well. She spent decades volunteering her time and energy to the Great Expectations Foundation, Habitat for Humanity and helping to found new social service programs for Center Point, Inc.

In 2013, she transferred the day-to-day operations of the fund to the Oklahoma City Community Foundation where she remained involved in grant-making decisions until her death. Through the Kirschner Trusts, Miriam and her family's legacy of generosity will continue to impact the Muskogee area as well as Jewish education and opportunities for foster children throughout the state in perpetuity.





# Sound Investments, Serious Impact

Every day at the Oklahoma City Community Foundation, we help individuals and families create lasting support for the community by ensuring their generosity will benefit generations to come.

The cornerstone of this endeavor is a sound investment policy that centers on sustainability. This year, the Community Foundation saw an astounding investment return of 27.74%. Coupled with the generosity of our donors, that resulted in a total market value of \$1.6 billion in assets as of June 30, 2021.

To be sure, the dollar figures are impressive. But even that pales in comparison to the serious impact those dollars mean to the community. Every charitable organization with an endowment at the Community Foundation benefits from the sound investments of our investment committee, leading to more dollars for organizations serving the community.

Since 1968, Skyline has served those living in the shadows of our community. Dedicated to making a difference in the lives of at-risk children, youth and adults, Skyline operates numerous programs, including an eye clinic, food resource center and store, clothing shop, garden program and wellness classes.

“It’s our mission to fill the gap in people’s lives,” said Rev. Debbie Ingraham, CEO of Skyline. “We’ve always focused on serving those who need it the most and meeting them where they are in life.”

For a charitable organization, an endowment at the Community Foundation is like having their own private granting fund, and the larger the fund, the larger the grant. Since the early 1990s, Skyline has benefited from their hard work building their endowment at the Community Foundation, resulting in nearly \$400,000 distributed by their endowment over the past three decades to support Skyline’s programs and operation costs.

“Our endowment at the Community Foundation means we can do more good for the metro: more clinics, more groceries, more clothes. It just means more for those we serve,” Debbie said. “Not only that, it helps us fund mission-critical staff positions.”

The charitable organization endowment program at the Community Foundation is the largest of its type in the United States with more than 370 nonprofit organizations participating. In addition, our endowment program is a one-stop shop including fund management, administration, development and gift facilitation, planned giving services, online giving, toolkits and training opportunities.

In 1979, in honor of the Community Foundation’s 10th anniversary, Community Foundation founder, John E. Kirkpatrick, offered a matching program to charitable organizations looking to establish or grow their endowment funds. Now more than 40 years later, the

Kirkpatrick Family Fund continues to award matching grants to charitable organizations establishing a new endowment fund or working to build an existing endowment at the Community Foundation. Through this program, organizations are encouraged to plan for their future, develop a reliable source of funding and engage a broad base of contributors from the community.

But perhaps the greatest impact comes from knowing that dollars given to an endowment today are gifts that will give back, supporting the programs and mission tomorrow, far exceeding the value of the original gift.

“I like to tell people that giving Skyline \$50 today means I can feed a family for one day,” Debbie said. “But, giving \$50 to our endowment at the Community Foundation means I can feed that same family for years.”





# Charitable Organization Endowments

The Charitable Organization Endowment program is one of the oldest programs at the Oklahoma City Community Foundation and one of the largest in the nation. In 1970, Jasper Ackerman established the first endowment fund at the Community Foundation

to benefit the National Cowboy and Western Heritage Museum. Today, the program has **1,378** funds representing **371** charitable organizations. Find a list of the funds at [occf.org/coelist](http://occf.org/coelist).

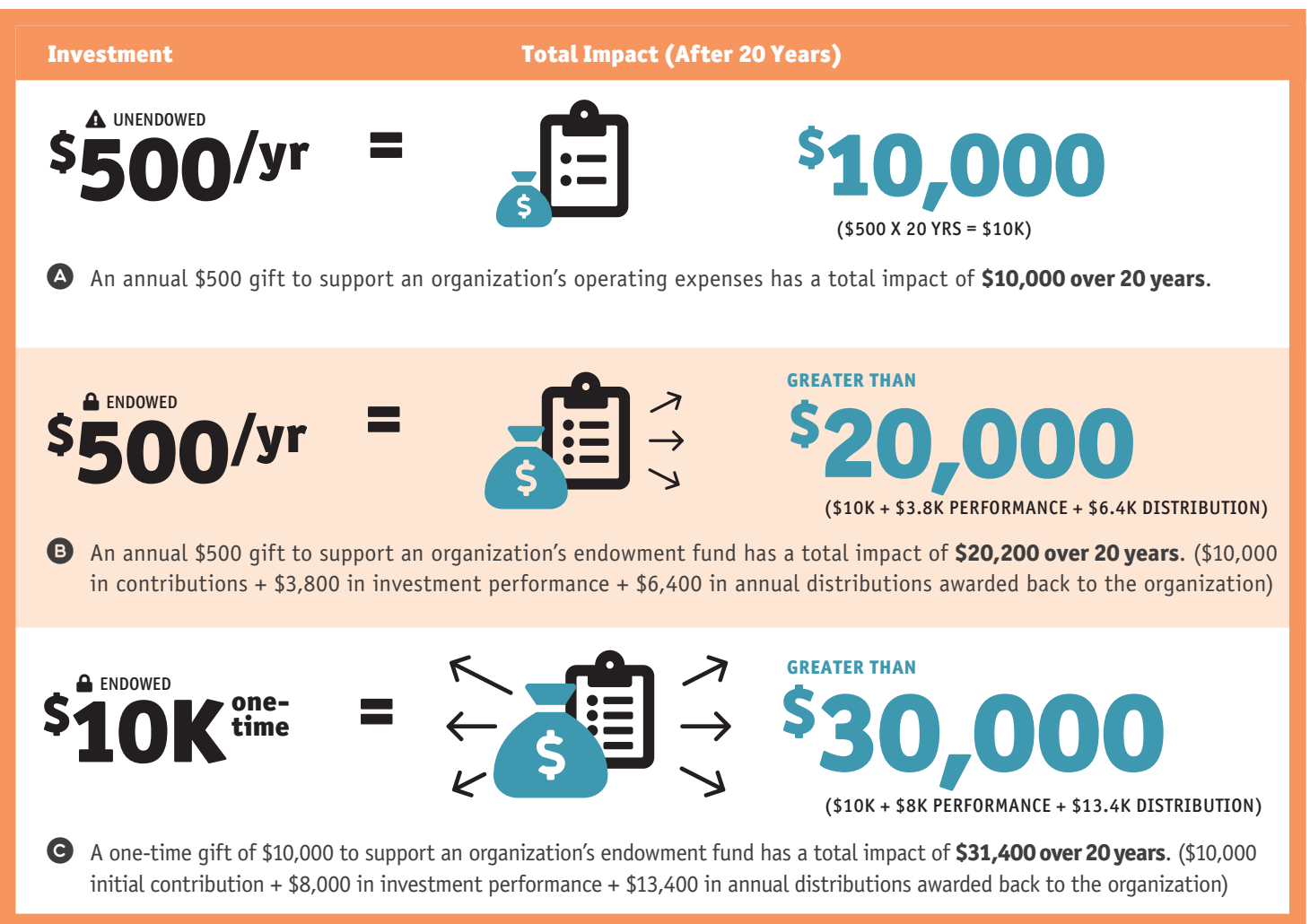
## Saving for the Future

Established by generous donors and charitable organizations themselves, the 371 Charitable Organization Endowments invested at the Community Foundation will support these organizations in perpetuity.

The Community Foundation's investment strategy provides endowment funds stability when the stock market is volatile and growth when the market is strong. The organization's annual distribution check, valued at 5% of the endowment fund's value, can provide reliable assistance to the communities they serve.

## Why Give to Endowment?

A gift to endowment is a gift that lasts forever. Here's a breakdown of how a gift given three different ways can impact an organization:



# Affiliated Funds « Charitable Organization Endowments

Affiliated funds are considered supporting organizations of the Oklahoma City Community Foundation. Established with a minimum of \$1 million, these funds operate under separate governing documents and trustees.

*Listed with date established and with specified sub-funds (•)*

## 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.

- Kirkland Hall Fund

## Deer Creek Schools Foundation | 1995

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

- Braden Park, LLC Fund

## Heritage Hall | 1996

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

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

## Leadership Oklahoma City | 1994

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 | 1991

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.

- Jasper Ackerman Fund
- A.J. and Phoebe Hearst Cooke Fund
- Docent Council Fund

## Oklahoma City Museum of Art | 1992

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

- Gene Barth Memorial Fund
- Fee-Milligan Endowment Fund
- Angie Hester 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
- Wiggin Family Collection Endowment Fund
- Florence Wilson Fund

## Oklahoma Philharmonic Society | 1995

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.

- Fund for Collaborative Performances
- Fund for Collaborative Performances - Doug and Peggy Cummings Fund
- Fund for Collaborative Performances - George Records Fund
- Raymond and Bonnie Hefner Fund
- Edward and Letitia Joullian Fund
- Oklahoma Philharmonic Wiggin New Audiences Fund

## 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.

- Clarence E. Page Fund
- Oklahoma Air and Space Museum

# Charitable Organization Endowments

Permanent endowments of \$40,000 or more and sub-funds of \$20,000 or more as of June 30, 2021.

• indicates specified sub-funds

\* indicates new fund established in Fiscal Year 2021

## Arts & Culture

Ambassadors' Concert Choir  
 American Banjo Museum  
 American Choral Directors Association  
 Arts Council Oklahoma City  
 •Greenberg Family Capitol Square Property Fund  
 Canterbury Voices  
 Chamber Music in Oklahoma  
 •Berrien Kinnard Upshaw Chamber Music  
 Cimarron Opera  
 deadCenter Film Fund honoring Lance McDaniel  
 Fine Arts Institute of Edmond  
 Jacobson Foundation  
 Jazz in June  
 KCSC Classical Radio 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  
 Oklahoma Arts Institute  
 Oklahoma Children's Theatre  
 Oklahoma City Ballet  
 •Good Better Best Fund  
 •Yvonne Chouteau School Fund  
 •John Kirkpatrick Executive Director 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

•McCune Family Oklahoma Contemporary Arts Center Education Fund  
 •Oklahoma Art League Fund  
 •James Pickel Education Fund  
 •Dr. Elliott R. Schwartz, Pamela & OUR Loving Girls' Fund  
 Oklahoma Museums Association  
 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  
 •Allie P. Reynolds Fund  
 •Kathleen Upshaw Fund  
 Vocal Sounds of Oklahoma

## Community Development Organizations

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  
 •Morris & Libby Singer Foundation Fund  
 Willa D. Johnson Recreation Center\*  
 Junior Hospitality Club  
 Junior League of Oklahoma City  
 Kiwanis Club Special Activities 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  
 •Sharline Reedy Fund  
 Oklahoma Center for Nonprofits  
 Oklahoma City Crime Stoppers  
 Oklahoma City Fire Department Project Life Endowment  
 Oklahoma City Foundation for Architecture  
 Oklahoma City Metro Literacy Coalition  
 Oklahoma County Bar Foundation  
 Oklahoma Energy Trails Foundation  
 Oklahoma Lions Service Foundation  
 Positively Paseo  
 Redbud Foundation  
 Rotary Club 29 Foundation  
 •Legacy Fund  
 Start Helping Impacted Neighborhoods Everywhere (S.H.I.N.E.) Foundation  
 Jim Thorpe Association  
 USA Softball  
 •USA Softball Junior Men's Team Funds  
 •USA Softball Junior Women's Team Fund  
 •USA Softball Men's National Team Fund  
 •USA Softball Women's National Team Fund  
 Women of AT&T, Oklahoma City Chapter  
 Women of the South

## Education: Community Organizations

Alliance Francaise d'Oklahoma, Inc

•Alliance Francaise French Language Educator Support Fund\*  
 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 City Metro Literacy Coalition  
 •Literacy Council Fund  
 •Mary Surbeck Literacy Fund  
 Oklahoma Humanities Council  
 Oklahomans for Special Library Services  
 Payne Education Center  
 Weatherford Public Library Foundation

## Education: Preschool through 12th Grade

Calumet School Foundation  
 Casady School  
 •Black Mesa Foundation Scholarship Fund  
 •Clements Fund  
 •Kirkland Hall Fund  
 •Carolyn Young Hodnett Scholarship Fund  
 •Eleanor Kirkpatrick Fine Arts Chair Fund  
 •John E. Kirkpatrick Humanities Chair Fund  
 •James C. & Virginia W. Meade Fund  
 •Jane B. McMillin Memorial Fund  
 •Records Family Scholarship Fund  
 •Charles Lee & Jana Lea Reynolds Fund  
 •Scholarships Fund  
 •Casady School - Jonathan R.L. Schwartz M.D. Scholarship Fund\*  
 •John & Mary Sue Shelley Fund



- Christ the King Catholic School  
Christian Heritage Academy  
Classen High School Alumni Association  
Crescent Public Schools Foundation  
Edmond Public Schools Foundation
- Lucile Johnson Peters Math Teacher of the Year\*
  - Rees Fund
  - Eloise Rodkey Rees Inspirational Essay Award
- El Reno Public School Foundation
- David Airington Memorial Scholarship Fund\*
  - 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
  - Gaylord & Barbara Reuter Scholarship Fund
  - Judge Emmett & Opal Samuelson Thompson Fund
  - Richard Steanson Scholarship Fund\*
  - 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
- Ray H. & Pat Potts Fund
  - 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  
Kingfisher Educational Foundation  
Erna Krouch Preschool  
Bishop McGuinness Catholic High School
- John & Sadhna Kelly Fund
  - Peter G. & Virginia M. Pierce Jr. Fund
- McCloud School Foundation Fund\*
- Midwest City-Del City Public Schools Foundation  
Millwood School District Enrichment Foundation  
Moore Public Schools Foundation for Academic Excellence  
Mount St. Mary Catholic High School
- Joseph C. Kolb Living Trust Fund
  - Virginia M. Kresl Fund
  - Tom Swyden Fund
  - Tyler Family Fund
  - Tyler Scholarship Fund
- Noble Public Schools Foundation for Academic Excellence  
Oklahoma Christian School  
Oklahoma FFA Foundation
- Anderson Endowment Fund
  - Davis Farms - Iron Mound Investments Gift Fund
  - Convention Endowment Campaign Fund
  - Masonic Fraternity of Oklahoma Fund
  - Oklahoma Farm Bureau Fund
  - Donald E. & Willadean Ramsey Fund
  - Steve & Merrie Lynn Vaughan Fund
- Oklahoma Foundation for the Education of Blind Children & Youth  
Oklahoma Foundation for Excellence  
Oklahoma School of Science & Mathematics
- Gary Salwierak Fund
- Positive Tomorrows  
Purcell Public School Foundation  
Putnam City Schools Foundation  
Rosary Catholic School  
Sacred Heart Catholic School
- John & Sadhna Kelly Fund
  - Ovid & Leona Fowlkes Foundation Trust Fund
- Southeast High School Alumni Support
- Pete S. & Lynne White Fund
  - Johnson-Records Family Foundation Fund
- 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
- C.B. Cameron Memorial Fund
  - Gregory L. Shadid Memorial Scholarship Fund
  - Bill & Wanda Swisher Fund
- Education: Colleges, 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
  - Greater Mt. Olive Langston 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
  - Business Program - Lloyd Minter Fund
  - Hobbs Lectureship Fund
  - James Hurley Professorship Fund
  - Scholarships Fund
- Oklahoma Christian University
- Olen V. Hurst Scholarship Fund
  - L.A. & Pansy E. Macklanburg Endowment Fund
- McBride Center for Faith & Literature Fund
  - W.T. Payne Endowment Fund
  - J.B. Saunders Endowment Fund
  - Pendleton & Robin Woods Endowment Fund
- Oklahoma City Community College
- Kamm International Student Scholarship Fund
  - Oklahoma City University
  - Ray & Lucille Ackerman Oklahoma City University Marketing Scholarship
  - Benham Professorship Fund
  - Logan Cary Fund
  - Film Institute Fund
  - Fine Arts Department Fund
  - Fred & Mary Eddy Jones Fund
  - Law School Dean's Fund
  - Law School Seminar Fund
  - Meinders School of Business OCU Steven C. Agee Economic Research & Policy Institute Fund
  - Meinders School of Business OCU Graduate Scholarship
  - Meinders School of Business OCU Undergraduate Scholarship
  - Oklahoma City University School of Law
  - Opera Association Fund
  - F.M. & Thelma Petree Fund
  - Petree School of Music Fund
  - J.B. Saunders 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 & Environmental Engineering
- Redlands Community College
- Alumni & Friends Association Scholarship
  - Black Baseball Endowment

- Casey Dell Brantley Scholarship - Organization Fund
- Romaette Bryant Memorial Nursing Scholarship
- Burrus Family Scholarship
- El Reno High School Class of '65 Endowed Scholarship
- El Reno Class of '65 Sophomore Scholarship
- El Reno Masonic Lodge #50 - Aggie Club Scholarship
- Scott L. Harlan Memorial Endowed Scholarship
- Howard & Rebecca Rainey Hutson Scholarship
- Drs. Owen & Bess Jenkins Endowment
- T.G. & Dorothy Johnson Memorial Endowed Scholarship
- Cathi Kennedy Scholarship
- Tyler Knecht Memorial Endowed Scholarship
- Christopher Lane Scholarship
- Marie West Lyons Scholarship
- Masonic Fraternity of Oklahoma Endowment Fund
- Edna McMahon Kelly Memorial Endowed Scholarship
- Tommy Pinkston Family Memorial Scholarship
- Martha Piper Nursing Scholarship
- Ray Porter Scholarship
- Cheryl Ross Rinehart Memorial Nursing Scholarship
- Renna V. Royse Scholarship
- Viridin Royse Memorial Endowed Scholarship
- Doris Anne Smith Transfer Scholarship
- James Shaw Scholarship
- Trotter-Gambel Scholarship
- Henry Jo Von Tungeln Memorial Agriculture Scholarship Fund
- Ruth Louise Wallace Nursing Endowed Scholarship
- Southern Nazarene University Scholarship
- Francis Tuttle Foundation
- University of Central Oklahoma
- Department of History & 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
- Air Force ROTC Detachment 675 Fund - Toni Lamoureaux Fund\*
- Air Force ROTC Detachment 675 Fund - Bill Schwertfeger 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
- School of Dance - Chouteau-Terekhov Faculty Fund

## Educational Support Organizations

- Beta Eta Lambda Scholarship
- Foundation of Alpha Phi Alpha
- Markoma Christian Ministries
- Moore High School Alumni Association
- 70s Legacy Scholarship
- 70s Legacy Paula Sue Gabrish Scholarship Fund
- Brent Gilson Memorial Scholarship
- George & Doral Hopper Scholarship
- Hoby & Anita Horn Scholarship
- Moore High School Alumni Association
- Paula Sue Gabrish Music Scholarship Fund
- Music Scholarship
- Bennie Raine Scholarship
- 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 & Animal Organizations

- Best Friends of Pets
- Central Oklahoma Humane Society
- Reggie Cordrey Fund
- Jim & Pam Klepper Fund
- Choctaw Parks Foundation - Historical Sculpture Gardens Perpetual Care
- Free to Live
- Friends of Martin Park Nature Center
- Greater Oklahoma City Parks & Trails Foundation
- Myriad Gardens Foundation
- Meinders Building & Maintenance Endowment
- Meinders Garden Maintenance Endowment
- The Nature Conservancy - Oklahoma Chapter
- James K. Hotchkiss Fund for the Nickel Preserve
- Nexus Equine
- OKC Beautiful
- Morrison Tucker Award
- Wildflowers Fund
- Pendleton & Robin Woods Fund
- Oklahoma City Boathouse Foundation
- E.L. & Thelma Gaylord Foundation Fund
- Oklahoma City Geological Foundation
- Oklahoma Horticultural Society
- George Vaclavek Memorial Fund
- Oklahoma Iris Society
- Oklahoma River Foundation
- BancFirst Fund
- E.L. & Thelma Gaylord Foundation Fund

- Waste Connections Fund
- Oklahoma Zoological Society
- Jean I. Everest Fund
- Goldman/Kirkpatrick Zoo Fund for Kids
- Florence Wilson Fund
- Scissortail Park Foundation
- Second Chance Animal Sanctuary
- The Tree Bank
- Pendleton & Robin Woods Fund

## Health-Related Organizations

- Ability Connection Oklahoma
- Alzheimer's Association - Oklahoma Chapter
- American Cancer Society
- C. Wayne Barbour Memorial Fund
- American Diabetes Association
- Arthritis Foundation - Oklahoma Chapter
- Catalyst Behavioral Services
- Cavett Kids Foundation
- Medical Center Volunteers Fund
- The Children's Center
- Children's Hospital Foundation
- C.R. Anthony Foundation Fund
- The Children's Hospital Volunteers
- Community Health Center - Mary Mahoney Memorial Health Center
- Perry & Jeanie Klaassen Fund
- Epilepsy Foundation Oklahoma
- Pendleton & Robin Woods Fund
- Fundación Manos Juntas honoring Dr. Boyd Shook
- David & Anna-Faye Rose Fund
- Dr. Boyd Shook Fund
- Virgil Stout Fund
- Health Alliance for the Uninsured
- Hearts for Hearing Foundation
- Integrus Foundation
- Baptist Burn Center Fund
- James L. Hall Jr. Center for Mind, Body & Spirit Fund
- Integrus Southwest Medical Center Fund
- Wann & Clara Langston Fund
- Roy & Alta Woods Memorial Fund
- The Leukemia & Lymphoma Society



## It's Never Too Late to Start Over

DesJean Jones has a heart for lifting people up when they need it most. After accepting the position as executive director for the Opportunities Industrialization Center of Oklahoma County (OIC), she realized her true calling was to help people regain their dignity and instill hope in them as they chart their new future.

"People walk into our space and are ashamed to be there, they are broken and embarrassed," said DesJean. "But we offer them the chance to start over."

For more than 50 years, OIC has provided programs that help adults reconnect to the workforce through education and skills training, and their success rate is astounding. With 95% of their high school equivalency students going on to attend college and even more entering the workforce within a year of passing their tests, OIC is doing just what their name says, creating opportunities.

But they don't just want to create opportunities for students today. In 1979, OIC established an endowment at the Oklahoma City Community Foundation.

"Our endowment fund shows me OIC is forward thinking and wants to ensure they remain a viable part of the OKC landscape," DesJean said. "It also positions us with other opportunities with OCCF and gives me confidence the Foundation is looking out for us too."

Today, OIC's endowment has grown to nearly \$500,000, and Jones wants to continue to invest and build up their endowment for years to come. "We're not going anywhere, I've got too much to do, and if I can inspire one more person to get ahead in life, I know I'm doing what I was put on earth to do" said Ms. Jones.



Lupus Foundation of Oklahoma  
 Dean McGee Eye Institute  
 •C. Wayne Barbour Memorial Fund  
 •Chick & Yvonne Hilgenberg Fund  
 Mental Health Association Oklahoma  
 Mercy Health Center  
 •Lawrence & Doretha Van Horn Fund  
 •Women’s Health Center Fund  
 National Multiple Sclerosis - Oklahoma Chapter  
 NorthCare  
 Oklahaven Children’s Chiropractic Center  
 Oklahoma Blood Institute  
 Oklahoma Caring Foundation  
 Oklahoma Heart Hospital Research Foundation  
 Oklahoma Lions Sight Conservation Foundation  
 •Angie L. Garner Memorial Fund  
 Oklahoma Medical Research Foundation  
 •Fleming Scholarship Fund  
 •Roger & Virginia Gohrband Fund  
 •D. Allan & Dorothy B. Harmon Memorial Fund  
 •Kornbaum Alzheimer’s Research Fund\*  
 •Research Fund  
 Oklahoma Physical Therapy Foundation  
 Parkinson Foundation of Oklahoma Fund\*  
 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 Organizations

45th Infantry Division Museum  
 •Fred & Betsy Daugherty Fund  
 •John C. Ross Fund  
 Arcadia Historical & Preservation Society

Break O’Day Farm & Metcalfe Museum  
 Cleveland County Historical Society  
 Edmond Historical Society  
 Freedoms Foundation at Valley Forge Medal of Honor Maintenance  
 Friends of Oklahoma Historical Society Archives  
 •Pendleton & Robin Woods Fund  
 Frontier Country Historical Society  
 •Lovell Historical Monument Maintenance Fund  
 William Fremont Harn Gardens & Homestead Fund  
 •1889er’s Fund  
 Lincoln County Historical Society - James A. Embry Fund  
 Military Order of the World Wars  
 Oklahoma Archaeological Survey  
 Oklahoma City National Memorial & Museum  
 Oklahoma City-County Historical Society  
 •Pendleton & Robin Woods Fund  
 Oklahoma Hall of Fame  
 •Judge Robert Hefner Family Fund  
 •Gary & Elizabeth Huckabay Scholarship Fund  
 •Scholarship Fund  
 Oklahoma Historical Society  
 •Dr. Bob Blackburn Collections Endowment\*  
 •Emily Bell Fund  
 •Cross S Ranch Fund  
 •Garmen Kimmell Endowment for the Oklahoma Historical Society’s Kilgen Organ Fund  
 •Guthrie Carnegie Library Fund  
 •Meinders Red River Journey Fund  
 •Elizabeth Niblack Melton Fund  
 •Murrell Home - Nell Bradshaw Fund  
 •Shirley Ann Ballard Nero Fund  
 •Oklahoma History Center Fund  
 •Nazih & Annette Zuhdi Fund  
 Oklahoma Military Hall of Fame  
 Oklahoma Railway Museum  
 •Steven Kamm Donor Designated Fund  
 Oklahoma Society Daughters of the American Revolution  
 •Ardmore Chapter Scholarship

•Cameo Society Fund  
 •Oklahoma City Chapter Fund  
 •Oklahoma Hearts & Hands Healthcare Scholarship  
 •Oklahoma Scholarship Endowment  
 •Ponca City Chapter Fund  
 •Veterans First Fund  
 Oklahoma State Firefighters Museum  
 Oklahoma Westerners Indian Territory Posse  
 Overholser Mansion  
 •Dianne Gumerson Memorial Fund  
 Pottawatomie County Historical Society  
 •Paul Milburn Gift 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  
 United Founders Neighborhood Foundation

## Religious Organizations

4HIM - His Healing Helping Hands International Ministries  
 All Souls’ Episcopal Church  
 •Clements Family Fund  
 •Hartsuck Music Fund  
 •Music Fund  
 Assemblies of God of Oklahoma Foundation  
 In Search of the Lord’s Way  
 •Earl A. Jones Fund  
 •Bill Phillips Fund  
 •Joanita Lawrence Fund\*

Life.Church  
 Scope Ministries International  
 Sisterhood of Temple B’nai Israel  
 •Seligson Flower Fund  
 St. Paul’s Episcopal Cathedral

## Senior Adult Service Organizations

Areawide Aging Agency  
 Baptist Village Communities – Oklahoma City location  
 Daily Living Centers  
 Edmond Mobile Meals  
 •Harris Foundation Fund  
 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 Organizations

Mary Abbott Children’s House  
 Aid for Individual Development  
 •Donald E. & Willadean Ramsey Fund  
 American Red Cross of Central Oklahoma  
 CARE - Child Abuse Response & Evaluation Center  
 CASA of Oklahoma County  
 Catalyst Behavioral Services  
 Catholic Charities of the Archdiocese of Oklahoma City  
 •Building Fund  
 •Love’s Travel Stops & Country Stores Building Fund  
 Center for Children & Families, Inc.  
 Center of Family Love  
 •Wittrock Family Fund  
 Central Oklahoma Association for the Deaf & Hard of Hearing  
 A Chance to Change  
 •Lucy & Bill Westerheide Family Assistance Fund  
 Citizens Caring for Children  
 City Rescue Mission  
 Coffee Creek Riding Center

Consumer Credit Counseling Services of Central Oklahoma  
 Deaconess Pregnancy & Adoption  
 Down Syndrome Association of Central Oklahoma Fund\*  
 EARC – Employment & Residential Centers  
 El Reno Blessing Baskets Fund\*  
 Faith Works of the Inner City  
 •Thomas O. McCullough Fund  
 Food & Shelter, Inc.  
 Genesis Project  
 Goodwill Industries of Central Oklahoma  
 •Margaret Annis Boys Trust Fund  
 HeartLine  
 Homeless Alliance  
 •Suzanne Silvester Fund  
 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  
 •Paul Milburn Fund  
 •Paul Milburn Maintenance Fund  
 Make-A-Wish Foundation of Oklahoma  
 Make Promises Happen – Central Oklahoma Camp  
 McCall’s Communities for Life Enrichment  
 •Richard & Sally Burpee Fund  
 •Walter Kann Foundation Fund  
 •John & Janice Markley Fund  
 •George Records Fund  
 •Records-Johnston Family Foundation Fund  
 •Alan & Mardie Schoellkopf Fund  
 •Robert & Lynn Spahn Fund  
 Meadows Center for Opportunity Neighborhood Services Organization  
 NewView Oklahoma  
 OIC - Opportunities Industrialization Center  
 OKC Metro Alliance  
 Oklahoma Baptist Homes for Children  
 •Russell & Sue Adams Fund  
 •Boys Ranch Town – Boone Transitional Living Fund

•Tilda Caruthers Educational Fund  
 •Donna J. Kornbaum Fund\*  
 •George M. Nix Memorial/Lloyd & Melba Scott Family Fund  
 •Eddie & Beth Perkins Family Fund  
 Oklahoma County Diversion Hub  
 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  
 •Donald & Willadean Ramsey Fund  
 The Salvation Army  
 •Building Maintenance Fund  
 •Ed Leslie Fund  
 Skyline Urban Ministry  
 Smile for a Child Foundation  
 •Edmond Memorial High School Fund  
 Special Care  
 •George Records Fund  
 •George Records Gift Fund  
 Special Olympics Oklahoma  
 Speck Homes  
 •Thomas Thadeus & Anna L. Eason Fund  
 •T. Winston Eason Memorial Fund  
 •M.G. McCool Memorial Fund  
 Sunbeam Family Services  
 TEEM - The Education & Employment Ministry  
 Trinity Legal Clinic  
 United Methodist Boys Ranch  
 United Way of Central Oklahoma  
 •Mary & Dick Clements Fund  
 Upward Transitions  
 Urban League of Greater Oklahoma City  
 The Urban Mission  
 •Frederick H. & Lois M. Kate Fund  
 •Mark Wayne & Brenda Gayle Powell Fund  
 The Virtue Center  
 Warriors for Freedom Foundation

Water4  
 •Paul Milburn Gift Fund  
 Westview Boys’ Home  
 Willow Springs Boys Ranch  
 Wings Special Needs Community  
 Work Activity Center  
 •Roy & Jo Thein Fund  
 World Neighbors  
 •Christine Holland Anthony Fund  
 •John & Claudia Holliman Affiliated Fund  
 •Margaret Replogle Fund  
 •Lawrence V. & Doretha L. Van Horn Fund  
 •World Neighbors – Paul Milburn Fund\*  
 WovenLife  
 •Gustave Woerz Trust Fund  
 Youth & Family Services, Inc. – El Reno  
 YWCA Oklahoma City

## Youth-Serving Organizations

American Energy Swim Club  
 Big Brothers Big Sisters of Oklahoma  
 Boy Scouts of America - Last Frontier Council  
 •B.C. Clark Fund  
 •Edward C. & Letitia Joullian III Fund  
 •Gossett-Boyer Fund  
 •Pendleton & Robin Woods Fund  
 Boys & Girls Clubs of Oklahoma County  
 •Aubrey McClendon Memorial Fund  
 •Mason Family Fund  
 Bridges of Norman in Honor of Elizabeth Hedrick Fund \*  
 Camp Fire USA - Heart of Oklahoma Council  
 El Sistema Oklahoma\*  
 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

Oklahoma Youth Expo – Funk Fund\*  
 Oklahoma Youth Expo – Meinders Fund\*  
 Denny Price Family YMCA of Enid  
 Salvation Army Boys & Girls Club of Oklahoma City  
 •Margaret Annis Boys Trust Fund  
 Whiz Kids - City Care  
 YMCA of Greater Oklahoma City  
 •Ray T. Anthony Fund  
 •Camp Classen Fund  
 •Downtown Branch Fund  
 •Downtown Branch - Ray H. & Pat Potts Fund  
 •Eastside Branch Fund  
 •Eberly Scholarships for Camp Classen  
 •Grady Family Fund  
 •Northside Branch Fund  
 Youth Leadership Exchange  
 •Mary L. Walsh YLX Scholarship

## Out-of-State Organizations

95th Division Foundation, Fort Wayne, Indiana  
 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 & Recreation Training Institute, Dallas, Texas  
 •B. Dan Kamp Fund  
 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

# Community Programs

For more than 50 years, the Oklahoma City Community Foundation has helped donors impact our community with charitable gifts. Through our scholarship and community program initiatives, we bring together donors, nonprofits and community leaders to meet the ever-changing needs of our community.

## Scholarships

As Oklahoma’s largest independent scholarship provider, our scholarship program offers a simple, enduring way to help students further their education. In fiscal year 2020, we offered more than 160 scholarships and awarded nearly \$2.8 million to 821 students. More than 200 scholarship opportunities are available statewide.

- Trustee Scholarship Initiative Program, including scholarships for first-generation students, students in foster care and nursing students
- Donor-designated scholarships for the Oklahoma City metro area and rural Oklahoma
- Programming for 54 school guidance counselors in central Oklahoma

## iFunds

The iFund program brings together donor interests to support services for children and the elderly, as well as provide access to health care. Since 2007, the iFund program has served as a pillar of our community grant program, totaling more than \$600,000 in grants over the past year.

- Opportunities for Children
- Services for the Elderly
- Access to Health Care

## GiveSmartOKC

The Community Foundation serves as a facilitator for smarter giving, encouraging our community to research local nonprofits to match their charitable vision. Since 2011, GiveSmartOKC.org has promoted transparency, helped charitable organizations tell their story and allowed donors to make informed decisions with their charitable dollars.

## Parks & Public Spaces

Inspired by a gift from Margaret Annis Boys, the Parks and Public Space Initiative supports the beautification of public lands and provides landscaping expertise to hundreds of schools, neighborhoods and public parks. In 2020, we furthered our beautification efforts with the launch of Rebloom Oklahoma, a massive urban beautification project distributing 57,000 daffodil bulbs throughout the metro.

- Rebloom Oklahoma Beautification Project
- Neighborhood Park Projects
- Community Reforestation Projects

## Wellness

The Community Foundation works with partners to make healthy living more accessible. KeepMovingOKC.org encourages people to get out and keep moving with free or low-cost physical activities.

- KeepMovingOKC
- Wellness Alliance
- Wellness Committee

2021

# Programs Grants

# \$7,458,317







# Addressing the Needs of the Most Vulnerable

As our city navigated its way through the pandemic, a group of local health care organizations, assisted by the Oklahoma City Community Foundation, found a way to meet the needs of our city's homeless population.

The Central Oklahoma Health Impact Team (COHIT) was formed in 2018 when the Community Foundation brought together four major non-profit hospitals in Oklahoma City to improve community health and address community health needs, none more prominent than the COVID-19 pandemic.

The COHIT team sprang into action creating a COVID-19 response plan and developed a new emergency shelter capable of housing 190 central Oklahoma individuals experiencing homelessness who were being discharged from hospitals, or who could not recover from COVID-19 at a traditional shelter. The operation was made possible through funding from a \$150,000 Disaster Relief Fund grant from the Community Foundation.

"Vulnerable central Oklahoma individuals experiencing homelessness really didn't have anywhere to seek safe shelter during this pandemic," said Nancy Anthony, president of the Community Foundation. "But because of this collaboration, COHIT was able to identify this problem and create a solution to isolate these individuals not only to keep them safe, but to keep

others in our community safe, as well."

The group identified two local shelters for this program and equipped them to address this emergency: Grace Rescue Mission and City Rescue Mission. Both shelters provided food, laundry and cleaning services, as well as nurses to monitor symptoms and connect patients with telemedicine and virtual care.

"Having those shelters in place really helped us keep the COVID -19 virus at a minimum within the homeless population in Oklahoma City, and we believe it helped save a lot of lives," said Dan Straughan, executive director of the Homeless Alliance in Oklahoma City.

Over the past year, most homeless shelters across the metro have established areas of their facilities where individuals needing isolation can quarantine, eliminating the continued need for the emergency shelter. But, the COHIT team continues to watch the state of our community's public health and is ready to act when their help is needed again.



Dan Straughan, Director of Homeless Alliance

# Scholarship & Award Funds

## Trustee Scholarship Initiative

In addition to scholarships established by individual donors, our Trustee Scholarship Initiative has encouraged Oklahoma students to attend college since 1998 through the following programs:

- **Community Foundation Scholars**

*2021-22 Academic Year: 96 students received \$2,000 awards.*  
Awards an underserved segment of college-bound students who are active in their schools and communities with a GPA between 3.25 and 3.79.

- **New Opportunities Scholars**

*2021-22 Academic Year: 54 students received \$2,000 awards.*  
Helps students become the first in their family to pursue a college education. Recipients apply as high school juniors and are required to complete a series of college preparatory activities.

- **Oklahoma Youth With Promise Scholars**

*2021-22 Academic Year: 33 students received awards up to \$5,000.* Awards scholarships to students who graduate high school while in Oklahoma's foster care system.

- **Nurse Education Program**

*2021-22 Academic Year: 16 students received \$2,000 awards*  
Offers scholarships to third- and fourth-year college students pursuing nursing as well as practicing registered nurses pursuing a nursing-related bachelor's degree.

## Central Oklahoma Guidance Counselor Network

Guidance counselors from 54 central Oklahoma high schools participate in educational seminars and ensure their students' eligibility for scholarships.

## Occf.academicworks.com

Our convenient online student application process at [occf.academicworks.com](http://occf.academicworks.com) has more than 160 scholarship opportunities, making it easy for students to apply and enabling us to reach a greater number of potential scholarship 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 by giving deserving students the opportunity to pursue higher education. Gifts can be made to any of the scholarships listed on pages 28-29. Learn how you can make an impact on students' educational journey at [occf.org/scholarshipgiving](http://occf.org/scholarshipgiving).

## 2021: By the Numbers



**\$2.8 million**  
awarded to  
**821 students**



**160+ scholarship opportunities**  
available for students.



**\$3,404.87**  
average scholarship  
award

**Learn more today!**

405-235-5603

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



# Hope Today, Opportunities Ahead

## *The Jacqueline Cook Fund and Scholarship Program*

As a social worker and special education teacher, Jacqueline Cook's career was highlighted by the lessons she learned from children. She was a mentor, confidant and leader for her students



and peers, but her influence didn't end at 5 p.m. She donated her time and expertise to numerous organizations, earning recognition for her work throughout the state of Oklahoma. So, it came as no surprise when she established a fund at the Oklahoma City Community Foundation in 2014 to support the Cavett Kids Foundation.

Through their camps and programs, Cavett Kids offers children with life-threatening and chronic illnesses a safe place to have fun, learn coping skills and connect with others in an exciting and encouraging atmosphere. Thanks in part to Jacqueline, all Cavett Kids' camps and programs are free of charge in the hope that every child who needs them can participate.

"The summer camp programs have impacted my life by giving me a sense of community and providing me with skills to cope and develop character," said Takia Vaughn, a Cavett Kids camp participant. "I've learned so much about how to be a leader, cope with my illness on a day-to-day basis, build character and

not allow my illness to define me."

Another camp participant, Maria Valles, echoed the sentiment. "My specialist at the hospital noticed how lonely I was, and she recommended Cavett

Kids. The camp gave me the chance to connect with others that were going through the same things, encouraging me to keep on fighting."

The Jacqueline B. Cook Fund has benefitted hundreds of children across the metro, providing hope to those who need it most. And now, Jacqueline's generosity is going even further thanks to the Jacqueline Cook Scholarship Fund, established in 2018 by a gift from Jacqueline's estate.

The scholarship benefits students who have participated or volunteered in Cavett Kids' summer camp programs. Each year, two \$4,000 scholarships are awarded to help fund educational opportunities for students like Maria and Takia.

"Jacqueline's legacy of giving is such an important part of our story," said Neil Tate, director of camps and programs at the Cavett Kids Foundation. "And adding her scholarship program to that legacy ensures the kids we serve have a bright future ahead of them."





# Scholarships & Award Funds

Permanent endowments of \$40,000 or more as of June 30, 2021.

\* Indicates new funds established during Fiscal Year 2021

95th Division Scholarship	Cravin' Flight Scholarship in Honor of Lt. Col. Matt Kincade*	Ironworkers Local 584 Harvey A. Swift Scholarship
Mike Allen Memorial Education Fund	Jean Hawley Curtis Scholarship	Virgil & Pauline Jackson Scholarship
Aaron Alley Memorial Scholarship	Harley Custer Memorial Scholarship	Dennis James Scholarship – Deer Creek Baseball
H.W. Almen West OKC Rotary Scholarship	Custom Dental Cares Scholarship Fund	Miles Jenkins Memorial Scholarship
American Society of Civil Engineers Scholarship	DANA Corporation Scholarship	Kay Jewell Scholarship
American Society of Landscape Architects Scholarship	Dortha Dever Business Scholarship – Oklahoma City University	William M. & Janet S. Johnson Scholarship
Andersen-Spraberry Scholarships	Douglass High School Class of 1967 Scholarship	Jones High School Scholarship
BSO Ivy Foundation Scholarship	Durant Community Scholarship	Dorothy Detrick Kendall Piano Scholarship Award – University of Oklahoma School of Music
Bank of Oklahoma Achieving New Goals Scholarship	Durrell Public Law Research Award	Dr. Edith King Mental Health Scholarship
John Barresi Memorial Scholarship	Embassy of Korea	Rev. Kenneth King Memorial Scholarship
Bennett Family Scholarship	Epperson Family Memorial Scholarship Fund	Martha King Scholarship
John Blaess Memorial Scholarship	Betty Ruth Estes Scholarship	Kirschner Trust Scholarship
Carrie Ann Nix Blakey Memorial Scholarship	Everett Foundation Scholarships	Donna Vandiver Knapp Piano & Vocal Music Education Fund
Patrick S. Bonds Memorial Scholarship	Mark Allen Everett Graduate Fellowship in String Performance University of Oklahoma School of Music	Valerie Koelsch Memorial Scholarship
April Bowman & Samantha Bowman Fiscus Scholarship for Northwest Classen High School	Extreme Aquatic Swim Team Scholarship	Donna & Harry Kornbaum Scholarship
Vinita F. Boyer Scholarship	Barbara Fagin Spirit of Volunteerism Award	Larry J. Kramer, 1959, U.S. Grant High School Scholarship
Alberta Brannon Scholarship	Brunel D. Faris Art Exploration Scholarship – Oklahoma City University	PFC Anthony Adam Landers “Zero To Hero” Scholarship
Dr. Eugene S. Briggs Memorial Scholarship	John Meacham Fogg Memorial Scholarship	Sally Jo Clark Langston Memorial Scholarship
Jennifer Lea Briggs Community Foundation Scholars Award	Karen Sue Freeman Memorial Scholarship	Wann & Clara Langston Scholarship
Diana & Larry Brown Family Education Scholarship Fund*	Irene P. & Samuel F. Frierson Educational Trust	Charles ‘Tommy’ Lewis Memorial Fund
Mike Buchwald Costume Design Scholarship	Friends of Kim Jones-Shelton Scholarship	James Anderson Logan Jr. and Betty Ann McFarland Logan Scholarship Fund
Frank & Merle Buttram String Awards	Fulmer Trombone and Musicians Scholarship	Learning with Love’s Scholarship
Capitol Hill High School Scholarship	Sybil Irene Gabbard Scholarship	Malzahn Family Fund – Noble County Scholarship
Elizabeth E. Carlson Scholarship	Wauhillau Austin Gale Memorial Scholarship	Malzahn Family Fund – Noble County Vocational Technical Education Scholarship
Ray Carpenter Memorial FFA/4-H Scholarship	Ema Garcia Memorial Scholarship	Tommy & Jackie Maxon Scholarship
Duane & Villa Rae Carter Scholarship	Garner-Stocker Foundation Scholarship	Darin McBride Memorial Scholarship
Casady Class of 1996 Scholarship	Edward King Gaylord Scholarship	Charles B. McCauley Community Foundation Scholars Award
Nola Casey Scholarship	Elsie Mae “Nat” Glosemeyer Scholarship	June Mitchell McCharen Scholarship
Central High School Alumni Association Scholarship	Freda Poole Grayson Scholarship	McGee Foundation Scholarship Fund
Central Oklahoma ASHRAE Scholarship	Greater Oklahoma City Alumnae Panhellenic Foundation Scholarship	Janet McNutt Harding High School Music Scholarship
Catherine Connolly Champlin Buchwald Education Scholarship	Elaine Hahn Memorial Business Scholarship	Gene & Sylvia McPherson Agricultural Scholarship
Lonnie & Nancy Childress Scholarship at Oklahoma Panhandle State University	Elaine Hahn Memorial Business Scholarship for Upperclassmen*	Benny McReynolds Memorial Scholarship
Kimberly Kay Clark Memorial Scholarship – Naval Reserve Association	Karen Hampton Memorial Scholarship	Melton Art Scholarship
Classen ‘55 Scholars Fund	Harding Fine Arts Academy Scholarship Fund (Harding High School Alumni Association)	Ruth Mershon Scholarship
Classen Awards Foundation	Harding Charter Preparatory High School Scholarship Fund (Harding High School Alumni Association)	Barbara J. Messenbaugh Strings Music Scholarship
Classen Class of 1945 Scholarship	Harris Harding Scholarship	Charles C. & Mary Lou Miles Scholarship
Classen Class of 1954 Scholarship	Mary Louise Hartpence Scholarship	Pam Ivester Millington Scholarship Fund
Classen High School Alumni Association Scholarship	Geneva Hood Award – Casady School	Michael Neal Minter Sr. Scholarship
Ralph Clinton Scholarship – Sales & Marketing Executives	Philip F. Horning OKCPS Scholarship	Richard Moesel Scholarship
James D. & LaVerna L. Cobb Scholarship for the OSU School of Civil and Environmental Engineering	Jonas & Mary Beatrice House Scholarship	Dr. Gary M. Moore Dance & Arts Management Scholarship
Commander Family Scholarship	G. Ed Hudgins Scholarship – OSU College of Engineering	Dr. Gary M. Moore Great Plan Scholarship
Jacqueline B. Cook Scholarship*	Hudiburg Family Fund Scholarships	Rick Nagel Family Scholarship for the Boys and Girls Club
Brad R. Corbett Memorial Academic Trust	Geneva Johnston Hudson Scholarship	Mittie R. Nickles Scholarship
	Khader K. Hussein Awards in Palliative Care	
	Hutchinson Scholarships	
	IBEW Local 444 Scholarship Fund*	

Northwest Classen High School Class of 1956 Scholarship  
 P.B. Odom III Family Scholarship  
 OGE Positive Energy Scholarship  
 OKC Northwest Lions Club Scholarship  
 Oklahoma Academy of Physicians Assistants Scholarship  
 Oklahoma Association for the Education of Young Children Scholarship  
 Oklahoma City All Sports Association Scholarship Fund  
 Oklahoma City Downtown Lions Club Gus Gudmunson Scholarship  
 Oklahoma City University – Richard Kells Memorial Scholarship  
 Oklahoma City University – Shdeed Law School Scholarship  
 Oklahoma Fire Chiefs Association – Keith Bryan Memorial Scholarship  
 Oklahoma Goodwill Industries Abilities Scholarship  
 Oklahoma State Board of Architecture Path to Licensure Scholarship  
 Oklahoma State Board of Licensure for Professional Engineers and Land Surveyors (OKPELS) Professionally Engineering the Future Scholarship  
 Oklahoma Youth With Promise Scholarship  
 Laurene Ann Opdyke Nursing Scholarship  
 Orner-Cook Scholarship  
 Deborah R. & Wayne A. Parker Scholarship  
 Patel Engineering Scholarship  
 Patel Family 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  
 Pride of Four Memorial Scholarship\*  
 Flavius Richardson Scholarship  
 Larry W. Roach Leadership Award  
 Robyn's Way Scholarship  
 Frank Rodesney Scholarship for Electrical Engineering at OU  
 Louise Rodesney Scholarship for Piano at OU  
 Jeffry Rogers Education Memorial Scholarship  
 Anna-Faye Rose Scholarship  
 Mary Baker Rumsey Volunteer Award – Junior League of Oklahoma City  
 St. James Catholic School Scholarships  
 • Albert & Freda Marottek Scholarship  
 • Lorene Sherman Memorial Scholarship  
 • Tracy Wilson Memorial Scholarship  
 Seay A. Sanders Jr. Scholarship

Maurine Sayre Scholarship Fund (Harding High School Alumni Association)  
 Harold W. Schmid Scholarship  
 Jonathan R.L. Schwartz M.D. Scholarship for Casady School\*  
 Maurice Joseph Schwartz Scholarship – OU Medical School\*  
 Sarah Elizabeth Schwartz Scholarship – Oklahoma City University\*  
 Matthew George Scott – Bronco IV Ever Scholarship  
 Mary & Spencer Sessions Teaching Award – Guthrie Public Schools  
 Willie Elizabeth Shipley Scholarship  
 Jeanette Sias Music Scholarship for Oklahoma City University  
 Robert & Mendell Simmons Scholarship\*  
 Joe B. Smith Memorial Class of 1942 Scholarship  
 Nina Garner Smith Community Foundation Scholars Award Fund  
 Robert V. & Ruby Mae Smith Memorial Scholarship  
 Southwest Homebuilders Association 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  
 H.F. and Mary Ellen Virgin Scholarship  
 Mary E. Watkins Scholarship  
 Carolyn Watson Opportunities Scholarship  
 Dr. Michael L. Weber Memorial Scholarship\*  
 Brian Wechsler Memorial Scholarship  
 Michael J. Weiss Scholarship  
 Wellston High School Hometown Scholarship\*  
 Western Oklahoma Building Trades Scholarship  
 Westmoore High School Alumni Scholarship  
 James Whitfield Employee Scholarship  
 Dean Wild Memorial Scholarship  
 Jackson Wilhite #LoveTheKicker Memorial Scholarship\*  
 Deral E. Willis Scholarship  
 James M. Wilson Scholarship  
 Women of the South Scholarship  
 Amber Fawn Wooten-Clark Memorial Scholarship  
 Kang Yang Memorial Scholarship  
 Mildred & William Young Scholarship  
 Dan Zanowiak Memorial Scholarship  
 Guy G. & Ginger S. Zimmerman OU Scholarship

## Scholarships Honoring Former Trustees

*Additional scholarships honoring 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  
 Oscar Jackson  
 Jane Jayroe Gamble  
 Ann Johnstone  
 William O. Johnstone  
 John E. Kirkpatrick  
 Linda Lambert  
 Judy Love  
 Steve Mason  
 Dean A. McGee  
 Frank McPherson  
 Harry Merson  
 Vicki Miles-La Grange  
 Anne Hodges Morgan  
 J. Larry Nichols  
 Ronald J. Norick  
 Paul B. Odom Jr.  
 P.B. Odom III  
 Bond Payne  
 F.M. Petree  
 George Records  
 Clayton Rich  
 J.B. Saunders Jr.  
 William F. Shdeed  
 Richard L. Sias  
 James R. Tolbert III  
 Morrison G. Tucker  
 Tony Tyler

# Meeting the Need Amidst Disaster

There are moments in life you will remember forever. March 2020 quickly became one of those moments, as our world slowed to a halt and our community took shelter to combat a global pandemic.

For charitable organizations, a whirlwind of questions began to arise. How do we serve our clients safely? How do we protect our essential employees? Where will the funding come from? What more can we do?

For the Oklahoma City Community Foundation, history was on our side. Having experienced both large- and small-scale disasters over our 50-year tenure, we were poised to meet the needs of our community. In less than a month, the Community Foundation awarded the first round of 2020 Disaster Relief Fund grants to assist central Oklahoma charitable organizations providing direct services and assistance to individuals impacted by COVID-19. This program included the Boys & Girls Clubs of Oklahoma County (BGCOKC.)

“When the pandemic hit, one of the first phone calls we received about helping our kids was from Nancy Anthony at the Oklahoma City Community Foundation,” said BGCOKC president & CEO,

Teena Belcik. “Without this emergency funding, we would have been unable to open our doors as a resource to essential workers.”

In early April, with the help of \$100,000 in Disaster Relief Fund grants, BGCOKC opened an emergency childcare facility for children of first responders and health care workers.

The early days of the pandemic were filled with changes and adaptations, but the goal of providing children with the physical, emotional and mental support they needed remained steadfast. With rigid cleaning regimens, low staff-to-student ratios, small groups, daily temperature check health questionnaires, medical-grade HEPA purifiers and mask policies, they found a way to serve children and families in need.

“After an incredibly difficult 18 months, we are continuing to adapt to help the youth who need us most in Oklahoma County,” said Teena Belcik. “Through community partnerships, like the Oklahoma City Community Foundation, we are able to provide evidence-based programming, academic enrichment, sports, activities and mentoring to give our members the tools to succeed and become who they are meant to be.”





# iFunds, Fiscal Year 2021

Bringing together gifts from likeminded donors to support services for children and elderly, as well as provide access to health care. In fiscal year 2021, we awarded \$554,600 in grants to 31 programs.

## Opportunities for Children

- **Arts Council Oklahoma City** — \$10,000 for educational arts experiences supporting the cognitive, social and creative development of youth attending Boys and Girls Clubs of Oklahoma County.
- **Canterbury Youth Voices** — \$5,000 to support an after-school music education outreach program for elementary students in south Oklahoma City.
- **Citizens Caring for Children** — \$20,000 to provide basic necessities to youth in foster care through the Citizens Caring for Children Resource Center.
- **City Care, Inc.** — \$30,000 to help teacher liaisons create individualized learning plans for Whiz Kids mentors and their mentees.
- **Girl Scouts Western Oklahoma** — \$25,000 to revitalize and expand troops in Oklahoma City Public Schools' middle schools.
- **Last Frontier Council, Boy Scouts of America** — \$20,000 to expand their scouting outreach program in underserved metropolitan elementary schools and neighborhoods.
- **Oklahoma Children's Hospital** — \$15,000 to provide art, STEM and innovation experiences for youth undergoing dialysis.
- **Oklahoma Children's Theatre** — \$12,000 to implement an early literacy program for preschoolers through stories and dramatic play.
- **Oklahoma City Ballet** — \$15,000 to support the BalletReach program bringing dance education to students with limited opportunities.
- **Oklahoma City Police Athletic League** — \$40,000 to support an athletics-based youth mentorship program for underserved, inner-city students.
- **Parent Promise** — \$10,000 to purchase books, developmental activity materials and educational toys for preschoolers.
- **RIVERSPORT Foundation** — \$20,000 to provide free or low-cost outdoor recreational activities to underrepresented youth in the Oklahoma City metropolitan area.
- **Special Care, Inc.** — \$12,000 to purchase musical instruments and performance equipment to be used by preschoolers with and without disabilities.
- **Thick Descriptions** — \$10,000 to support a summer enrichment program focusing on science, technology, engineering, anthropology and math.

## Access to Health Care

- **Mercy Health Foundation Oklahoma City** — \$25,000 to provide mammograms, biopsies, ultrasounds, genetic counseling, translation services, MRIs and specialist appointments for Black and Hispanic females age 40 to 65.
- **The Oklahoma Caring Van Program** — \$10,000 to provide immunizations for youth who qualify for the Vaccines for Children program, or who are uninsured.

- **Mental Health Association Oklahoma** — \$20,000 to provide medical care and service navigation to individuals experiencing homelessness and who are in permanent supportive housing units.
- **Planned Parenthood Great Plains** — \$25,000 to provide health care visits and STI testing for uninsured young adults.
- **Calm Waters Center for Children and Families** — \$20,000 to fund additional grief counseling staff.
- **Pivot** — \$34,000 to support a clinic drop-in center, in partnership with Variety Care, for young adults ages 16 to 24 who are experiencing homelessness.
- **Community Health Centers** — \$26,000 to provide mammograms and breast exams for uninsured women.
- **Positive Tomorrows** — \$2,500 to provide specialized lice treatments for youth experiencing extreme cases of infection.
- **Oklahoma Dental Foundation** — \$30,000 to provide veterans with the oral care needed to receive dentures in partnership with D-Dent.
- **City Care** — \$20,000 to provide oral health care to individuals transitioning out of homelessness, in partnership with volunteer dentists from Oklahoma Family Dentistry.
- **Skyline** — \$25,600 to fund a one-year program addressing the link between poverty and chronic disease, including nutrition, cooking, physical activity, social work and hope consultations for individuals identified through Skyline's programs.

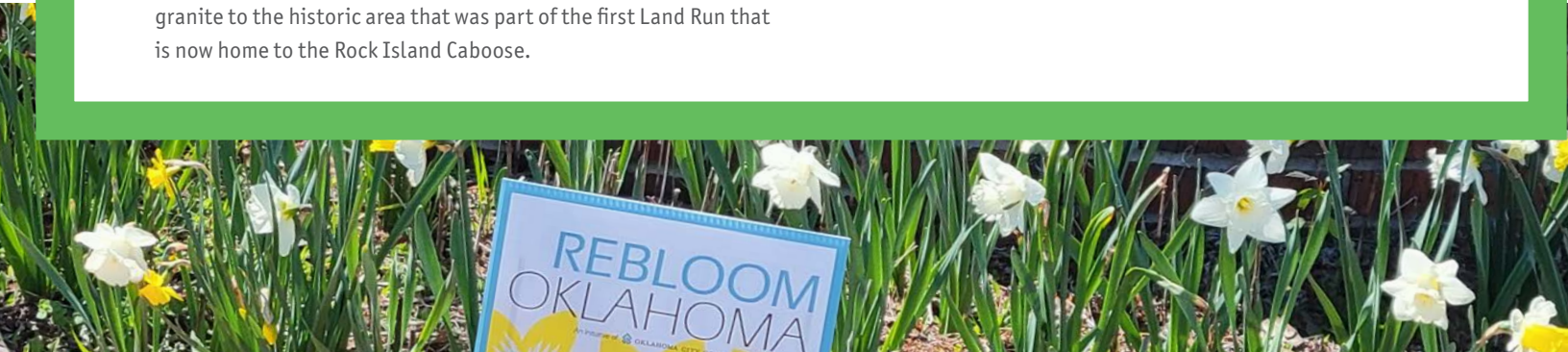
## Services for the Elderly

- **Daily Living Centers** — \$15,000 to support a transportation project helping seniors at the Jeltz Senior Center—a low-income senior housing complex—access groceries, medications, wellness opportunities and more.
- **Oklahoma City Ballet** — \$15,000 to support the Golden Swans program offering senior ballet and Dance for Parkinson's classes to help with loss of balance, flexibility and cognitive function.
- **Rebuilding Together OKC** — \$15,000 to purchase materials to build handicap access ramps for seniors.
- **RIVERSPORT Foundation** — \$2,500 to support a dragon boat league for seniors that provides physical exercise, socialization and rewarding experiences.
- **The Salvation Army Central Oklahoma Area Command** — \$20,000 to purchase furniture and other household items that are necessities for low-income seniors who live independently after transitioning out of homelessness.
- **VillagesOKC** — \$5,000 to support their Porch Pals program in which volunteers deliver plants and flowers to seniors monthly, and offer conversation and interaction at a safe distance with personal protective equipment.

# Parks & Public Space Initiative, Fiscal Year 2021

Awarding grants and providing hands-on expertise for landscaping improvements to schools, neighborhoods and public parks. In fiscal year 2020, we awarded \$122,500 in grants to 10 projects.

- **City of Edmond Parks and Recreation** — \$14,000 to plant trees adjacent to an inclusive playground area at Mitch Park in north Edmond.
- **Oklahoma Children's Theatre** — \$13,000 to fund 40 free productions at Will Rogers Park in the fall and spring.
- **Oklahoma Christian University** — \$15,000 to plant trees adjacent to Oklahoma Christian University's Eagle Trail Loop on the campus' northwest side.
- **Rollingwood Neighborhood Association** — \$11,000 to add a small stage, additional seating and a walking surface in the pocket park.
- **WesTen District** — \$7,000 to plant shade trees in two WesTen district neighborhood parks.
- **City of Choctaw** — \$11,050 to add landscaping, trees, benches and granite to the historic area that was part of the first Land Run that is now home to the Rock Island Caboose.
- **Fields and Futures** — \$18,150 to add trees and landscaping to athletic fields at Mary Golda Ross Middle School and Classen SAS High School at Northeast.
- **Lynn Institute of Health Care Research** — \$15,000 to add landscaping, trees, seating and stage needed to create a pocket park in the northeast Oklahoma City neighborhood.
- **Myriad Gardens Foundation** — \$6,300 to replace trees lost in the October 2020 ice storm.
- **RIVERSPORT Foundation** — \$12,000 to add trees and landscaping to a Boathouse District welcome area at the intersection of Phillips Avenue and SE 5th Street.



*Rebloom Oklahoma:*

## Beautification from Inspiration

In 1995, Ralph Meador sent a letter to the Oklahoma City Community Foundation expressing his dismay at the condition of some of Oklahoma City's parks. But, inspired by the Community Foundation's beautification efforts through the Margaret Annis Boys Trust, Ralph saw an opportunity to make a difference and remember his late mother.

Through a series of letters, Ralph outlined his passion for urban beautification. Together with the Community Foundation, he established the Lillian Frances Watts Meador Fund to honor his late mother, spread her love of gardening and support beautification efforts across the metro.

"A field of interest fund was the perfect tool to accomplish Ralph's goals," said Joe Carter, vice president of development at the Community Foundation. "Even though he's gone, the Oklahoma City Community Foundation can determine where

his dollars can make the greatest impact for his designated charitable interest."

Today, Ralph's dream of a beautiful and bright community has blossomed through Rebloom Oklahoma. This massive urban beautification project distributes daffodil bulbs for planting in neighborhoods, parks, streets, schools, churches and libraries throughout the Oklahoma City metro.

In its first year, Rebloom Oklahoma planted more than 57,000 bulbs in the metro. Now in its second year, Rebloom Oklahoma will distribute an additional 70,000 bulbs across Oklahoma City. They are expected to bloom in spring 2022. Thanks to Ralph Meador and the Community Foundation, Oklahoma City has been brightened by 127,000 daffodils in just two years.

And to think, it all started with a few letters and a little inspiration.



# A New Dawn for Memorial Park

Every day, the sun rises in the east and greets Oklahoma City's Memorial Park. Its rays bask the trails and gently warm the tennis and basketball courts as the park awaits the many visitors it will see throughout the day.

At the far west end of Memorial Park is a fountain made of cast stone that rests peacefully in an oval-shaped amphitheater. Although ornate in design, the fountain has fallen into disrepair.

At first glance, Memorial Park seems like just another park nestled in the heart of a bustling metro. But, a closer look reveals an intriguing history of this urban green space—and the important significance of that fountain.

When it was first built in 1902, it was named Putnam Park for Israel M. Putnam, a local attorney and real estate developer. In 1928, it was renamed Memorial Park to honor "soldiers of all wars and those of future wars." Replacing a small lake, the fountain was erected to "represent life and rejuvenation."

As one of the oldest in the city, Memorial Park has a special place in the hearts of Oklahoma City residents. And even though its fountain now sits dormant, a new dawn is coming thanks to the Oklahoma City Community Foundation.

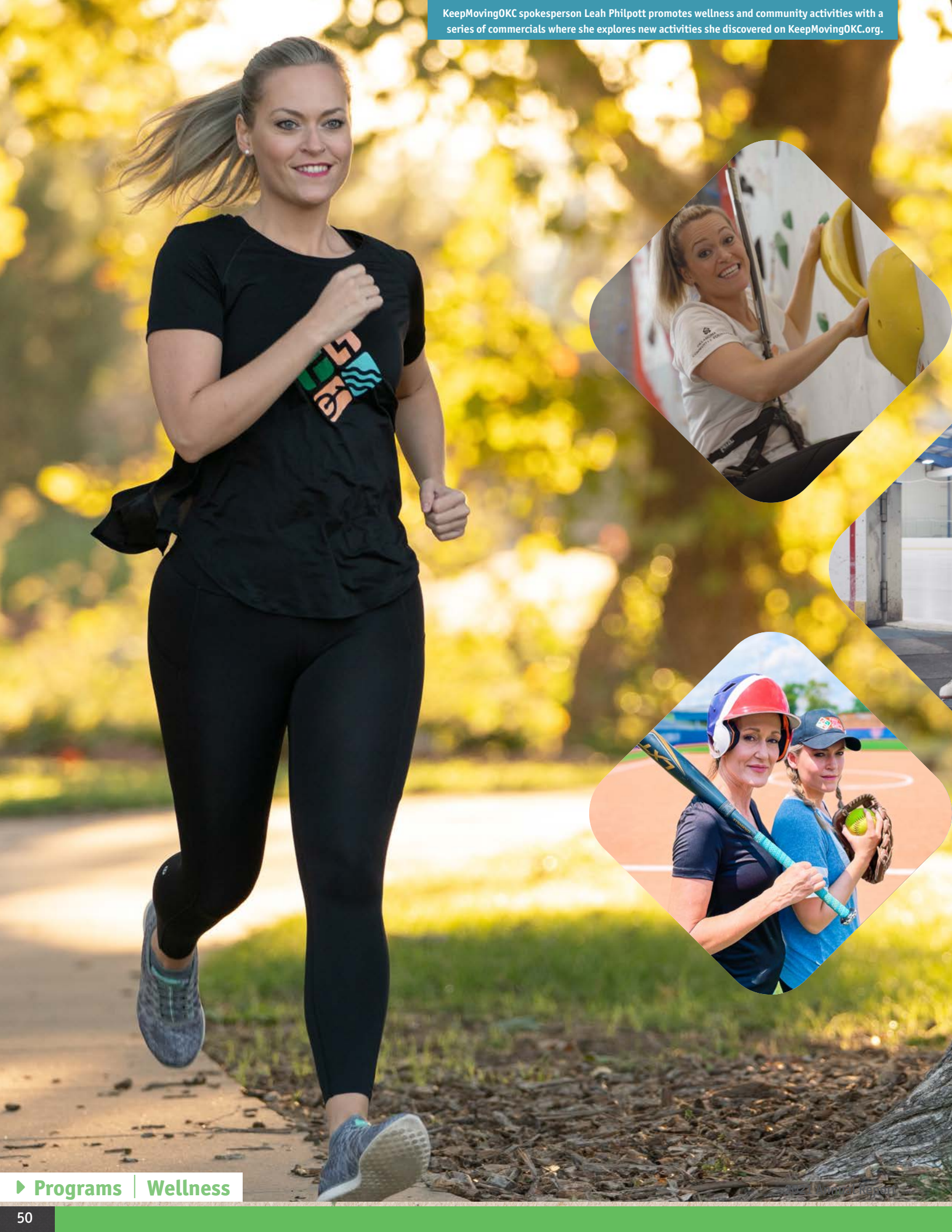
This year, the Oklahoma City Community Foundation will begin partnering with Oklahoma City's Parks and Recreation Department to refurbish Memorial Park's fountain and restore it to its former glory. It's a long process that's just beginning, but thankfully, it's one for which the Community Foundation is well-prepared.

"The Community Foundation has a long, proud history partnering with donors, community organizations and governments to enhance parks, trails and public spaces," said Brian Dougherty, the Community Foundation's director of its Parks & Public Spaces Initiative. "Our commitment to Memorial Park reflects the same spirit of the park itself: honoring the past and preserving a legacy."

The sun rises on Memorial Park, greeting a dormant fountain that awaits rejuvenation from the Community Foundation.









# Keep Moving to Keep Healthy

“ Hey everybody, Leah here to tell you about all the free and low-cost physical activities you can find on KeepMovingOKC.org!”

— Leah Philpott  
KeepMovingOKC spokesperson

In March 2021, a bubbly and excited Leah Philpott hit the air as the new spokesperson for KeepMovingOKC.org. While the Oklahoma City Community Foundation has maintained a community wellness program since 2014, the program found new life in 2020 when it launched KeepMovingOKC's online community calendar. Filled with free or low-cost physical activities throughout the metro, KeepMovingOKC.org's buzz and excitement has only grown as Leah has appeared at some of the events found on KeepMovingOKC.org.

“After spending months in the house during the pandemic, it was time to get the community motivated again,” said Nancy Anthony, president of the Community Foundation. “KeepMovingOKC.org has done a great job of giving people a fun

way to engage in physical activities regardless of experience level.”

By partnering with clubs, organizations and advocates throughout Oklahoma City's wellness community, KeepMovingOKC.org has become an activity hub where people of all ages can discover activities, parks and trails.



# Give Where You Live with GiveSmartOKC.org

Whether you're a charitable organization in central Oklahoma or researching an organization to give to, GiveSmartOKC.org is your partner for informed and impactful charitable giving.

Following its upgrade in 2020, GiveSmartOKC.org and the Oklahoma City Community Foundation are making it even easier for charitable organizations to demonstrate their impact in the community with

expert-led profile building and update sessions. Sessions are offered at least once a month, but capacity is limited, so be sure to register early! Email [GiveSmartOKC@occf.org](mailto:GiveSmartOKC@occf.org) to learn more.

“ A lot of the time, when staff at charitable organizations get stuck or confused, they simply stop making updates, but with these in-person sessions, we are there to answer questions, eliminating that issue, allowing them to not only complete their profile, but really make it stand out to donors.”

— Rachel Mouton  
GiveSmartOKC Manager

“ GiveSmartOKC gives me a basis for seeing if an organization is financially sound, and it shows me whether the nonprofit is doing what it's intended to do.”

— Ed Krei  
Bank Consultant and Community Foundation Trustee

“ Our GiveSmartOKC profile helps us keep the OIC story fresh and evolving—like the populations we serve—and allows our donors to recognize that OIC is a solvent and serving organization that is worth their trust and investment.”

— DesJean Jones  
OIC of Oklahoma County Executive Director



“ I’m so grateful for the team at OCCF and their willingness to refresh my knowledge of the GiveSmartOKC platform. I felt like a VIP getting one-on-one training! They answered all my questions – even the silly ones – and helped me feel more comfortable managing my organization’s profile. I’m thankful for such a beneficial tool and a helpful team of professionals. They’re the best!”

— Mandy Heaps  
OKC ZOOFriends Executive Director





# Relief for the Starving Arts

John and Eleanor Kirkpatrick were champions of arts and culture, providing philanthropic leadership to a number of organizations that bring important cultural assets to central Oklahoma. They believed arts and culture to be essential for building community, nurturing health and well-being and contributing to economic opportunity. Thanks to their help, the quality of life in central Oklahoma has been enhanced through the creativity and resources our artists, galleries, theaters and museums offer as well as the shared experience of literature, music and art.

The landscape of central Oklahoma's arts and culture changed dramatically throughout the pandemic as artists and arts organizations sought new and innovative ways to keep creativity within reach of their communities. While some arts organizations pivoted to virtual programming, all were forced to cancel, close or indefinitely halt in-person programming, events, educational classes and performances, resulting in devastating revenue loss and depletion of reserves.

In a survey of 39 arts nonprofits, Allied Arts gauged the health of area arts and cultural organizations during the pandemic, assessing data from March 2020-February 2021. The survey showed not only tens of millions of dollars in lost revenue, but also revealed the impact transcended the financial loss. Survey

participants reported they were forced to lay off 521 administrative, education and artistic staff in addition to a loss of more than 1.8 million audience members.

To mitigate the potential of great cultural loss in central Oklahoma, the Kirkpatrick Family Fund pledged \$1 million to Allied Arts over a three-year period to assist in nonprofit arts recovery and forward momentum. This contribution is a demonstration of the Family Fund's ongoing commitment to a thriving cultural ecosystem, supporting immediate and lasting community impact by investing in and strengthening the resilience and sustainability of the creative sector across central Oklahoma.

The Kirkpatrick Family Fund, the largest affiliated fund in 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, civic and social priorities of the communities it supports. Through the leadership of Trustee and President, Christian Keese, the Kirkpatrick Family Fund remains committed 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 over \$139 million through project, operating and endowment building grants.



# Kirkpatrick Family Fund Large and General Operations Grants, Fiscal Year 2021

In fiscal year 2021, the Kirkpatrick Family Fund distributed grants totaling \$9,146,143 to 180 different organizations. Grants were awarded by focus area in the categories of small project support, large project support, general operations and matching endowment.

## Animals

- **Fund for Animals** — \$25,000 for general operations.
- **Humane Society of the Pikes Peak Region** — \$25,000 for general operations.
- **Wildlife Conservation Society** — \$50,000 for general operations.

## Arts and Humanities

- **Allied Arts Foundation** — \$1,125,000 over three years for Restart the Arts.
- **Arts and Humanities Council of Tulsa** — \$25,000 to support the Hardesty Center.
- **Arts Council of Oklahoma City** — \$30,000 for All Access Arts.
- **Carpenter Square Theatre** — \$20,000 to support theatre productions in Oklahoma City and recovery from a warehouse fire.
- **Colorado Springs Fine Arts Center at Colorado College, CO** — \$25,000 to support the Access to Arts Initiative.
- **Colorado Springs Philharmonic Orchestra, CO** — \$10,000 to support performances of the Nutcracker, featuring the Oklahoma City Ballet.
- **Fine Arts Institute of Edmond** — \$20,000 for access to the arts in central Oklahoma.
- **Green Box, CO** — \$770,000 to support the 2021 Green Box Arts Festival and Artist-in-Residence program.
- **Mid-America Arts Alliance, MO** — \$10,000 to support Oklahoma arts and cultural programming.
- **Oklahoma Children's Theatre** — \$25,000 for theatre opportunities for children.
- **Oklahoma City Ballet** — \$200,000 to support education and outreach programs.
- **Oklahoma City Repertory Theatre** — \$25,000 to support theatre productions in Oklahoma City.
- **Oklahoma Contemporary Arts Center** — \$1,575,000 to support access to the arts in central Oklahoma.
- **Oklahoma Historical Society/History Center** — \$85,000 to support 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** — \$20,000 to support services to Oklahoma museums.
- **Oklahoma Shakespeare in the Park** — \$25,000 to support theatre productions in Oklahoma City.
- **Oklahomans for the Arts** — \$55,000 to develop an arts education database and support access to the arts in central Oklahoma.
- **Ormao Dance Company, CO** — \$20,000 to support the 2020-21 season.
- **Painted Sky Opera** — \$10,000 to support opera performances in central Oklahoma.

A piece of the Kirkpatrick Group varied art collection, Kenneth Snelson's *Sleeping Dragon* was installed outside the Kirkpatrick Oil Company Building in 2011 to highlight Oklahoma City's Western Avenue.





- **Paseo Artists Association** — \$25,000 to support access to the arts in central Oklahoma.
- **Ralph Ellison Foundation** — \$25,000 to support initiatives that highlight the work of author Ralph Ellison.
- **Red Earth** — \$15,000 to support access to the arts in central Oklahoma.
- **Tulsa Artists Fellowship** — \$25,000 to support arts programming in Tulsa.
- **William Fremont Harn Gardens** — \$30,000 to support preservation of the historic homestead.

## Children, Youth & Families

- **Big Brothers Big Sisters of Oklahoma** — \$15,000 to support mentoring in Norman and Oklahoma City.
- **Boys & Girls Clubs of Oklahoma County** — \$50,000 to provide a safe space for children outside of school.
- **Center for Children and Families** — \$30,000 to support services for families who have experienced trauma.
- **Citizens Caring for Children** — \$10,000 to support the Resource Center.
- **Family & Children's Services** — \$25,000 to support the Women in Recovery program.
- **Girl Scouts of Western Oklahoma** — \$25,000 to support Camp Trivera.
- **Infant Crisis Services** — \$15,000 to support infants and toddlers in need of food and diapers.
- **Mary Abbott Children's House** — \$10,000 to support renovations to the client kitchen and communal space.
- **Parent Promise** — \$15,000 to support child abuse prevention education.
- **Pivot** — \$25,000 to support services for homeless and at-risk youth.
- **Positive Tomorrows** — \$25,000 to provide education to homeless children.
- **Special Care** — \$25,000 to provide education to children with special needs.

## Community Development

- **Executive Service Corps of Central Oklahoma** — \$16,000 to support consulting services for nonprofits.
- **Mollie Spencer Farm** — \$325,000 to educate about animal well-being and regional history in Yukon, Oklahoma.
- **Neighborhood Alliance of Central Oklahoma** — \$20,000 to help build safe, crime-free neighborhoods.
- **Neighborhood Services Organization** — \$20,000 to provide housing, dental care and food to families in need.
- **Oklahoma Women's Coalition** — \$25,000 to support the Gender Equity and Health Education Campaign.
- **Philanthropy Southwest** — \$25,000 for the 2021 Annual Conference in Oklahoma City.
- **Possibilities** — \$20,000 to support building community relationships.

- **Rebuilding Together OKC** — \$20,000 to support free home repairs for seniors.
- **StitchCrew** — \$10,000 for the StitchCrew Accelerator Program.
- **Sunbeam Family Services** — \$25,000 to support services for seniors.
- **Tulsa Community Foundation** — \$25,000 to support the 1921 Tulsa Race Massacre Centennial Fund.
- **Yukon Community Support Foundation** — \$25,000 for the City of Yukon special events.

## Education

- **Casady School** — \$10,000 for school operations.
- **Chisholm Trail Museum** — \$10,000 for museum renovations.
- **Community Literacy Centers** — \$10,000 to support adult literacy education.
- **Payne Education Center** — \$15,000 for teacher training on remediate dyslexia.
- **Ute Pass Elementary School, CO** — \$82,000 for the Green Box Arts children's programs.

## Environment

- **Myriad Gardens Foundation** — \$25,000 for updates to the South Entry Plaza.
- **Tree Bank** — \$10,000 to support tree planting.

## Health

- **Dentists for the Disabled and Elderly in Need of Treatment** — \$30,000 for the Restorative Care Program.
- **Good Shepherd Ministries** — \$10,000 to support the purchase of a new ventilation system for COVID safety.
- **Health Alliance for the Uninsured** — \$25,000 to support health care for uninsured Oklahomans.
- **Mental Health Association of Oklahoma** — \$20,000 to promote mental health awareness.
- **Mercy Health Foundation Oklahoma City** — \$100,000 for the Mercy Women's Center.
- **Oklahoma City Indian Clinic** — \$18,000 to support teen pregnancy prevention.
- **Oklahoma Medical Research Foundation** — \$25,000 to support medical research.
- **Oklahoma Project Woman** — \$10,000 to support breast health care for uninsured women in Oklahoma County.
- **Planned Parenthood Great Plains** — \$150,000 to support teen pregnancy prevention.
- **Regional AIDS Intercommunity Network of Oklahoma** — \$20,000 to support those affected by HIV/AIDS.
- **Teen emPower!** — \$60,000 to support teen pregnancy prevention.
- **THRIVE** — \$250,000 to support teen pregnancy prevention.
- **Trust Women Foundation** — \$11,000 to support making IUDs available in Oklahoma.

## Human Services

- **A Chance to Change Foundation** — \$25,000 to support counseling services for those facing addiction.
- **Britvil Community Food Pantry** — \$10,000 to provide food for individuals in the Britton/Village area.
- **Calm Waters Center for Children and Families** — \$15,000 to support grief counseling services.
- **CASA of Oklahoma County** — \$10,000 to train advocates for children in foster care.
- **Center for Employment Opportunities** — \$10,000 to support job services for those with recent criminal convictions.
- **Heartline** — \$30,000 to support the 2-1-1 call center.
- **Metropolitan Better Living Center** — \$50,000 to support adult day care services and a new marketing plan.
- **Palomar: Oklahoma City Family Justice Center** — \$20,000 for the children's sanctuary.
- **Remerge of Oklahoma County** — \$20,000 to support the female incarceration diversion program.
- **United Way of Central Oklahoma** — \$150,000 for the 2020 Annual Campaign.
- **Upward Transitions** — \$15,000 to support services to the homeless.
- **The Urban Mission** — \$25,000 to support the Kids in Need Program.
- **YWCA of Oklahoma** — \$15,000 to support services to domestic violence victims.

## Kirkpatrick Family Fund Endowment Grants and Matching Program

Below are the Kirkpatrick Family Fund grants to permanent organizational endowments approved during fiscal year 2021. Those eligible organizations participating in a match challenge apply for a match and agree to raise their intended goal within one year, securing them \$1 in a matching grant for every \$3 they commit to raise.

\* indicates matching endowment grant

### Arts & Humanities

• Allied Arts Foundation*	\$8,000
• El Sistema Oklahoma	\$250,000
• Friends of Libraries in Oklahoma*	\$2,000
• L'Alliance Francaise d'Oklahoma	\$5,000
• Oklahoma Historical Society*	\$500,000
• William Fremont Harn Gardens	\$10,000

### Children, Youth & Families

• Fields & Futures*	\$1,000,000
• Oklahoma Baptist Homes for Children*	\$20,000
• Positive Tomorrows	\$50,000
• Willow Springs Boys Ranch	\$5,000

### Community Development

• Association of Fundraising Professionals*	\$3,500
• Dale K. Graham Veterans Foundation*	\$15,000
• Impact Oklahoma*	\$6,000
• Neighborhood Services Organization*	\$3,000
• Shartel Boulevard Development Authority*	\$6,500
• World Neighbors*	\$200,000

### Education

• Casady School	\$10,000
• Christian Heritage Academy*	\$20,000
• El Reno Public Schools Foundation*	\$8,500
• Heritage Hall School*	\$250,000
• Jones Longhorn Team One Club	\$15,000
• Kent School	\$5,000

• Langston University	\$5,000
• Library Endowment Trust	\$10,000
• McCloud Public Schools Foundation*	\$15,000
• Mount St. Mary High School*	\$20,000
• Mount St. Mary High School	\$50,000
• OSSM Foundation*	\$2,500
• Southern Nazarene University*	\$20,000
• United States Air Force Academy	\$5,000
• United States Military Academy	\$5,000
• United States Naval Academy	\$5,000
• UCO Foundation/Kirkpatrick Service Awards Fund	\$5,000

### Environment

• The Nature Conservancy, Oklahoma Chapter	\$10,000
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### Health

• Health Alliance for the Uninsured*	\$3,000
• St. Anthony Hospital Foundation	\$5,000

### Human Services

• Bridges of Norman	\$50,000
• Catholic Charities	\$50,000
• Center of Family Love*	\$6,500
• Edmond Mobile Meals*	\$25,000
• El Reno Blessing Baskets*	\$15,000
• Food and Shelter of Norman	\$50,000
• Urban Mission*	\$3,500
• Wings Special Needs Community*	\$15,000



# Statements of Financial Position, Consolidated

Rounded to nearest thousand.

2021 unaudited numbers.

<i>ASSETS</i>	June 30, 2021	June 30, 2020
Cash	\$ 5,361,000	\$ 6,267,000
Investments	1,568,672,000	1,154,968,000
Real estate investments, net	13,067,000	14,669,000
Contributions receivable and beneficial interest in trusts	7,182,000	2,231,000
Property and equipment	22,779,000	21,020,000
Other assets	2,685,000	2,741,000
<b>TOTAL ASSETS</b>	<b>\$ 1,619,746,000</b>	<b>\$ 1,201,896,000</b>

## *LIABILITIES*

Grants and program services payable	\$ 13,746,000	\$ 15,268,000
Annuity contracts payable	2,044,000	2,153,000
Other liabilities	4,861,000	3,378,000
Charitable funds held for the benefit of other organizations	164,818,000	118,656,000
<b>TOTAL LIABILITIES</b>	<b>\$ 185,469,000</b>	<b>\$ 139,455,000</b>

## *NET ASSETS*

Without donor restrictions	\$ 387,457,000	\$ 260,577,000
With donor restrictions	1,046,820,000	801,864,000
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 1,619,746,000</b>	<b>\$ 1,201,896,000</b>

# Statements of Activities, Consolidated

Rounded to nearest thousand.

2021 unaudited numbers.

<i>REVENUES AND SUPPORT</i>	June 30, 2021	June 30, 2020
Contributions	\$ 116,040,000	\$ 41,847,000
Investment return (net)	299,533,000	29,784,000
Change in value of split-interest agreements	1,102,000	63,000
Administrative fees and other income	627,000	534,000
<b>TOTAL REVENUES AND SUPPORT</b>	<b>\$ 417,302,000</b>	<b>\$ 72,228,000</b>

## *EXPENSES AND DISTRIBUTIONS*

Grants and program services	\$ 39,627,000	\$ 41,133,000
General and administrative	4,987,000	5,092,000
Development	852,000	690,000
<b>TOTAL EXPENSES AND DISTRIBUTIONS</b>	<b>\$ 45,466,000</b>	<b>\$ 46,915,000</b>

CHANGE IN NET ASSETS	\$ 371,836,000	\$ 25,313,000
NET ASSETS AT BEGINNING OF YEAR	1,062,441,000	1,037,128,000
<b>NET ASSETS AT END OF YEAR</b>	<b>\$ 1,434,277,000</b>	<b>\$ 1,062,441,000</b>

Amounts are presented net of activity on agency transfers.

Our annual independent audit report and the related audited consolidated financial statements with footnotes is available on our website, [occf.org](http://occf.org).



# Investment Performance, Fiscal Year 2021

Pooled Investments as of June 30, 2021

	Fiscal Yr (July–June) 2021	Calendar Yr (Jan.–June) YTD	Three Years (Fiscal)	Five Years (Fiscal)	10 Years (Fiscal)
<b><u>EQUITIES</u></b>					
Oklahoma City Community Foundation	43.82%	13.50%	17.70%	17.08%	13.05%
S&P 500	40.79%	15.25%	18.67%	17.65%	14.84%
MSCI ACWI GD	7.53%	12.56%	15.14%	15.20%	10.48%
<b><u>FIXED INCOME</u></b>					
Oklahoma City Community Foundation	0.15%	-1.37%	5.14%	2.96%	2.93%
Bloomberg Barclays U.S. Aggregate	-0.33%	-1.60%	5.34%	3.03%	3.39%
<b><u>ALTERNATIVES</u></b>					
Oklahoma City Community Foundation	45.23%	31.18%	5.11%		
<b><u>TOTAL RETURN</u></b>					
<b>Oklahoma City Community Foundation</b>	<b>27.74%</b>	<b>9.64%</b>	<b>12.24%</b>	<b>11.11%</b>	<b>8.84%</b>
50% Russell 3000/15% ACWI Ex US/35% Bloomberg Barclays Capital G/C Int*	25.96%	8.18%	12.98%	11.81%	9.53%

\* Our total return benchmark is 50% Russell 3000 15% ACWI ex US and 35% Bloomberg Barclays Capital G/C Int.

## 10 Year Investment Performance History

Fiscal Year Ended	General Pool Rate of Return	Composite Indices (Note A)	Fiscal Year Ended	General Pool Rate of Return	Composite Indices (Note A)
June 30, 2021	27.74%	25.96%	June 30, 2015	4.20%	3.49%
June 30, 2020	2.76%	6.13%	June 30, 2014	14.56%	16.56%
June 30, 2019	7.72%	7.86%	June 30, 2013	11.24%	12.58%
June 30, 2018	7.80%	8.25%	June 30, 2012	2.31%	1.63%
June 30, 2017	11.08%	11.98%	10 Years Compounded (Note A)	8.84%	9.53%
June 30, 2016	1.34%	1.20%			

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.

## Our Distribution Policy

Since 1989, the Oklahoma City Community Foundation has employed a spending policy that is designed to permit funds to capitalize on good investment years while offering protection in the event of a low or negative return. Annual distributions for most permanent endowment funds are based on a spending policy that distributes up to 5% of the fund's average value for the previous 12 quarters as of March 31. (For funds with less

than 12 quarters of history, the distribution calculation is based on the existing history). Any excess return remains in the fund to add value, building the fund value and protecting the future distribution stream from inflation. The annual distribution is predictable, stable from year-to-year and does not depend on a specific investment allocation to income-producing assets.

For more information on our investment policies, visit [occf.org/investmentmanagement](https://occf.org/investmentmanagement) or contact Rhonda Godwin, vice president of administration, at 405-606-2916.

# Volunteer Committees, Fiscal Year 2021

Thank you to the following individuals who volunteered their time and expertise to serve on the following committees during July 1, 2020–June 30, 2021.

## Executive Committee

Provides administrative and management oversight. All committee members served as Trustees during Fiscal Year 2021.

Scott Spradling, Chair	Steven C. Agee
Mike Collison	David Feroli
Edward Krei	Jenny Love Meyer

## Investment Committee

Oversees investment management and selects investment managers.

Mike Collison, Chair	Steven C. Agee
Martha Burger	Steven C. Davis
Mark Funke	Kirkland Hall
Edward Krei	Ken Miller
Shelley Sanders	Paul Dudman, ex officio
Christian K. Keesee, ex officio	

## Audit Committee

Provides oversight on annual audit process.

David Feroli, Chair	Mike Collison
Eddie Ditzler	Edward Krei
Bob Slovacek	Scott Spradling

## Trustee Scholarship Initiative Committee

Provides oversight for the Trustee Scholarship Initiative programs.

Michael Carolina, Chair	Elana House
Pat Kelly	Jean Lehr
Jessica Martinez-Brooks	Anita May
Diane Ming	D.J. Morgan
Christin Mugg	Ashley Stevenson

## Charitable Organization Endowment Program Committee

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

Edward Krei, Chair	Steven C. Agee
Tina Burdett	Ed Crane
Brenda Granger	Beth Shortt

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

Reviews and provides insight on public parks and beautification projects and grants.

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

## iFunds: Opportunities for Children

Reviews and provides oversight for the Opportunities for Children iFund grants.

Leigh Ann Albers	Ray Bitsche
Matilda Clements	Jennifer Stewart
Alison Taylor	Susan Rees Wright

## iFunds: Access to Health Care and Services for Elderly

Reviews and provides oversight for the Access to Health Care and Services for Elderly iFund grant programs.

Leigh Ann Albers	Linda Brinkworth
Shirley Cox	Keith Kleszynski
Cathy Lippard	

## Wellness Initiative Committee

Provides oversight for Wellness Initiative activities and grant requests.

Talita DeNegri, Chair	Carrie Blumert
Natalie Friend-Walters	Carol Hopper
Jefferson Kilgore	Ed Long
Jonas Mata	Steve Petty
Destiny Warrior	Ashley Weedn

## Rural Oklahoma Classroom Enhancement Review Committee

Reviews and provides insight on rural Oklahoma Classroom Enhancement grants.

Ann Caine	Lu Hoenig
Anita May	Suzanne Spradling
Mary Surbeck	

# Staff



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



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**Cathy Lippard**  
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**Tiffany Peterson**  
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**Jessica Schwager**  
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**Jennifer Stewart**  
Director, Donor Services  
405/606-2912



**Joni Younts**  
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405/606-2947



**David Autry**  
Communications Specialist  
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**Joe Carter**  
Vice President, Development  
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**Brian Dougherty**  
Director, Parks &  
Public Space Initiative  
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**Rick Fernandez**  
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Guidance Counselor Network  
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**Rhonda Godwin**  
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**Jared Mabrey**  
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## Contact Us

### Location

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.

### Phone & Email

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