

The Lawton 2011 Annual Report

Community Foundation www.LawtonCF.org

Dear Donors and Friends,



On behalf of the Trustees of the Lawton Community Foundation it is my pleasure to share with you the 2011 Annual Report, which highlights the impact of this organization between July 1, 2010 – June 30, 2011.

As an Affiliated Fund of the Oklahoma City Community Foundation, together we are committed to administering permanent endowments for the benefit of our community. During Fiscal Year 2011, we welcomed four new funds and as of June 30, 2011, we have a total of 32 endowments participating in our Charitable Organization Endowment and Scholarship and Award Endowment programs.

The Lawton Community Foundation adheres to the investment policy of the Oklahoma City Community Foundation, which is designed for endowment funds to provide annual distributions for charitable purposes in perpetuity. We are pleased to report that the investment performance on our pooled investments for the fiscal year was 21.57 percent, the best performance in our history.

In Fiscal Year 2011, we awarded \$24,500 in scholarships to 13 area high school seniors through the Lawton Community Foundation Scholars program. Through our Community Grants and Matching Grants programs, we awarded \$87,480 in grants to 18 area charitable organizations. Since our establishment in 1999, we have reinvested more than \$1.2 million back into the community through scholarships, community grants and annual distributions to charitable organizations.

These efforts would not be possible without the support of our donors. We hope you will join us in supporting the charitable interests of our community. For more information, please contact us at 580/353-4747 or visit www.LawtonCF.org.

Gene Love
President, Board of Trustees



Photo courtesy Oklahoma Conference of The United Methodist Church

The Kathy Bea Holsinger Reese Memorial Fund will provide support for adults and children to attend camps and retreats through St. Paul's United Methodist Church such as SonShine Camp, a summer camp offered through Oklahoma United Methodist Churches for children entering first and second grades. Above, two recent campers enjoy refreshments.

Honoring a Loved One Through a Lasting Gift

Lawton native Kathy Bea Holsinger Reese was known for her fearless spirit and her strong Christian faith. A 1968 graduate of Lawton High School, Kathy attended Oklahoma State University before graduating from Kansas State University in 1972. She and her husband Tony moved back to Lawton in 1973 to raise their family and became active members of the community.



Kathy Bea Holsinger Reese

Kathy was a teacher at various schools in the Lawton Public School system for 26 years. She taught students at Almor West Elementary, Woodland Hills Elementary and Lawton Eisenhower Junior High before receiving her master's degree in education from East Central University and becoming a counselor at Lawton MacArthur Middle School.

A devoted mother to her two sons, Kathy's brother Preston Holsinger says the two things she loved most in the world were her family and God. Kathy was an active member of St. Paul's United Methodist Church and the Great Plains Emmaus Community. She enjoyed participating in spiritual retreats including the Walk to Emmaus, a program intended to strengthen the local church through the development of Christian disciples and leaders.

After Kathy's death in March of 2011, her family established the Kathy Bea Holsinger Reese Memorial Fund at the Lawton Community Foundation to support discipleship activities through St. Paul's United Methodist Church. The fund will help children and adults attend summer camps and retreats through the church, says Preston.

"Kathy was a tremendous person with a strong Christian background," says Preston. "We wanted to find a way to honor her memory and we knew that she would want this."

The Lawton Community Foundation works with donors to establish endowment funds to support a variety of charitable purposes. If you would like to make a gift or establish a fund to honor a loved one or to support a charitable cause, please contact us at 580/353-4747 or visit www.LawtonCF.org.

Lawton Community Foundation Donors

The donors listed below have made cumulative contributions of \$500 or more to permanent endowments at the Lawton Community Foundation. We currently administer three Advised Funds established by donors to accomplish their charitable goals. If you are interested in making a gift or establishing an Advised Fund at the Lawton Community Foundation, please contact us at 580/353-4747 or visit www.LawtonCF.org.

Owen & Jane Ard
Stephen & Nancy Arntz
Bank of the Wichitas
Lt. Col. (Ret) L.A. Beckman III
Bivens Memorial
Dianne & Chad Bledsoe
Leonard & Tanya Case
David A. Clement
Robert A. & Darcy A. Cline
Lt. Col. (Ret) Francis & Joanne F. Curran
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Lawton Retail Merchants Association
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Public Service Company of Oklahoma
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Signal Mountain Associates
Michael & Jamie Smith
Southwestern Medical Center
Travis H. Tomlinson
David Towe
Robert M. & Barbara B. Vaughan
Dennis & Sandra K. Ward
Lanny & Florence Wilson
James F. & Jackie R. Wood

Advised Funds

Virginia Brewczynski Legacy Fund
Katherine D. Lacy Fund
Gene & Carolyn Anne Love Gift Fund

See page 6 for more information about the types of Advised Funds we offer.

A Scholarship Endowment Perpetuates a Legacy of Selfless Service

A four-star general in the U.S. Army, Gen. Donald R. Keith had a very distinguished military career. During World War II, he served in the U.S. Army as an enlisted soldier. In 1949, he graduated from the U.S. Military Academy at West Point and was commissioned as a field artillery second lieutenant. He went on to receive his master's degree from Columbia University in 1958, preceding a faculty assignment at West Point.

Gen. Keith commanded artillery units at all levels including the 36th Field Artillery Group in Europe and served in Korea during the Cuban missile crisis. He held various positions in the Office of Research, Development and Acquisition for the U.S. Army in Washington, D.C. but according to his son Mike, his most enjoyable assignment and the one he was most proud of was Commanding General of Fort Sill and Commandant of the U.S. Field Artillery School.

After leaving Fort Sill in 1977, Gen. Keith returned to Washington to serve as the Deputy Chief of Staff for Research, Development and Acquisition and later as the Commanding General of the U.S. Army Material Development and Readiness Command. In 1984, he retired after more than 35 years of military service. Following his retirement, he continued his involvement with the U.S. Field Artillery Association, a national organization based at Fort Sill to promote the Field Artillery. He served as chairman of the association from 2002 until shortly before his death in 2004.

Among the many military honors Gen. Keith was awarded were the Distinguished Service Medal, the Legion of Merit with two oak leaf clusters, the Bronze Star and the Army Commendation Medal with oak leaf cluster.

"My father truly epitomizes a lifetime of selfless service," says Mike.

In addition to giving back to his country through military service, Mike says his father enjoyed being a mentor.

"It was a common theme throughout his career," he says. "He helped many young people through military service and in the civilian world."

In 2009, Mike established the Gen. Donald R. Keith Memorial Scholarship fund at the Lawton Community Foundation to support a scholarship through the U.S. Field Artillery Association Scholarship program.

"There is no better way to honor my dad than to establish a way for him to continue to help young people further their education," says Mike.

Scholarship and award funds provide donors with a way to honor their loved ones. In addition to helping donors establish an endowment, the Lawton Community Foundation can facilitate administration of the fund and ensure perpetual support for the scholarship program. If you are interested in creating a scholarship or award fund, please contact us at 580/353-4747 or visit www.LawtonCF.org.



Gen. Donald R. Keith



Front Row: Claudia Normand, Colton Rancourt, Ashley Swain, Calicia Stith, Jessica May, Richard Young, Jasmine Walker. Back Row: Ashley Pace, Jasmine Nasalroad, Zane Klein, Shaneiqua Hernandez, Caitlin Anderson, Joseph Kinsman. Not pictured: Brent Zimmerman, Lessli Paul

15 Area Students Receive Scholarships at Annual Breakfast Event

In May 2011, the Lawton Community Foundation hosted its annual scholars' breakfast where 15 area high school seniors were awarded a total of \$27,000 in scholarships.

"The Trustees of the Lawton Community Foundation are pleased to support this scholarship program," says Gene Love, president of the Lawton Community Foundation. "It is our goal to encourage Lawton area students to attain the highest level of education and training, and we hope Lawton area residents will help support the program so it continues to meet the educational needs of our community."

The Lawton Community Foundation awarded 11 scholarships in the amount of \$1,500 each and the Lawton Noon Lions Club presented two awards of \$1,000 per year for four years. Additionally, awards were presented from the Benny McReynolds Scholarship fund and the Lamont N. Wilson ROTC Scholarship fund, two independent scholarship endowments established to benefit Lawton area students.

2011 Lawton Community Foundation Scholarship recipients:

Altus High School – Caitlin Anderson
 Cache High School – Richard Young
 Duncan High School – Ashley Pace
 Eisenhower Senior High School – Joseph Kinsman, Jasmine Walker and Brent Zimmerman
 Elgin High School – Ashley Swain
 Frederick High School – Shaneiqua Hernandez
 MacArthur Senior High School – Zane Klein, Jasmin Nasalroad and Lessli Paul

2011 Lawton Noon Lions Club Scholarship recipients:

Eisenhower Senior High School – Claudia Normand and Colton Rancourt

2011 Benny McReynolds Memorial Scholarship recipient:

Frederick High School - Jessica May

2011 Lamont N. Wilson ROTC Scholarship recipient:

Eisenhower Senior High School – Calicia Stith

Recipients of the Lawton Community Foundation and Lawton Noon Lions Club Scholarships are selected by a scholarship committee with the assistance of high school counselors and a committee at each school. The Benny McReynolds Memorial Scholarship fund was established in 2010 at the Oklahoma City Community Foundation to benefit graduating seniors from Frederick High School and the Lamont N. Wilson ROTC Scholarship fund was created in 2010 at the Lawton Community Foundation to support an award for an Eisenhower Senior High School ROTC graduate in honor of Lance Cpl. Lamont N. Wilson.

Since its inception in 2001, the Lawton Community Foundation scholars program has awarded more than \$125,000 in scholarships to area students. If you are interested in supporting this important program or establishing a scholarship endowment fund, please contact us at 580/353-4747.

Charitable Organization Endowments

The Lawton Community Foundation administers a Charitable Organization Endowment program to provide a reliable source of income for charitable organizations, while also offering a convenient way for donors to make contributions. Currently the program includes 28 organizations and as of June 30, 2011 the market value of the program exceeded \$1.9 million. Total distributions for the year were more than \$68,000. Several of these endowments support scholarship programs administered through the establishing organizations. For more information on these Charitable Organization Endowments, please visit www.LawtonCF.org.

Name	Fund Value at 6.30.11	FY2011 Distribution
Arts for All	\$ 46,254	\$ 1,469
Cache School Scholarship Fund	114,756	4,480
Comanche County Memorial Hospital Foundation	19,273	891
J. Roy Dunning Children's Shelter	21,004	754
Field Artillery OCS Alumni Chapter	64,544	2,086
First United Methodist Church Foundation of Lawton	142,060	5,474
Fort Sill Armed Services YMCA Gene Love Endowment	241,220	9,610
Frederick School Enrichment Foundation	21,583	1,036
Giddy Up 'N Go	59,356	2,478
Great Plains AMBUCS-Kid's Zone	19,712	920
Great Plains - Jim Nisbett Scholarship Fund	52,705	2,083
Great Plains Technology Center Foundation	20,967	667
Greater Lawton Rotary Club	35,393	
Robert E. Greiner School for the Handicapped of Comanche County	31,321	1,448
Hackberry Flat Foundation	51,488	2,041
Holiday in the Park	20,164	941
Lawton AMBUCS Lou Brox Endowment	49,664	1,965
Lawton Community Theatre	28,819	1,077
Lawton - Family YMCA	17,535	821
Lawton Food Bank	51,254	1,625
Lawton Philharmonic Orchestra	28,915	1,078
Lawton Public School Foundation	379,341	14,926
Museum of the Great Plains	27,800	1,246
On the Chisholm Trail Association Heritage Center	40,890	1,425
St. John Lutheran Church Foundation	20,000	*
Southwest Oklahoma Genealogical Society	19,209	896
United States Field Artillery Association Foundation	282,155	5,225
United Way of Lawton/Ft. Sill	39,429	1,578
Total	\$1,946,811	\$ 68,240

* New fund established on June 29, 2011

Established between July 1 – Oct. 15, 2011

	Fund Value
Association of the U.S. Army – Fires Chapter	\$20,000
Kathy Bea Holsinger Reese Memorial Fund <i>(for the benefit of St. Paul's United Methodist Church)</i>	\$23,895

Scholarship and Award Endowment Funds

The Lawton Community Foundation currently administers four scholarship endowment funds that provide perpetual support for area scholarship programs. These funds are listed below along with fund values as of June 30, 2011.

Name	Fund Value at 6.30.11
Gen. Donald R. Keith Memorial Scholarship	\$ 29,086
Lawton Noon Lions Club Scholarship	111,852
Oklahoma Arts Institute Scholarship	25,507
Lamont N. Wilson ROTC Scholarship	22,835
Total	\$ 189,280



The Lawton Community Theatre received a Community Grant in Fiscal Year 2011 to purchase new microphones. "The microphones enhance our performers' voices in a very natural way and are easy to use," says Cynthia Kent, managing director. "Above all, our audiences have enjoyed the improved sound quality enormously. We would never have been able to purchase this level of equipment without the aid of the grant from the Lawton Community Foundation." In June 2011, the Lawton Community Theatre presented Willy Wonka (pictured above.)

Fiscal Year 2011 Community Grants

The Lawton Community Foundation awarded \$42,480 in Community Grants to nine charitable organizations during Fiscal Year 2011. The Community Grants program, which awards grants of up to \$5,000, is designed to enhance the quality of life and provide opportunities for Lawton area citizens. For more information about our Community Grants program, visit www.LawtonCF.org.

Marie Detty Youth and Family Services Center - \$2,500 to support a youth advocate at the New Directions women's shelter for families escaping domestic violence.

J. Roy Dunning Children's Shelter - \$5,000 to purchase playground equipment at the shelter.

Family Promise of Lawton - \$5,000 to purchase a phone and computer system.

Friends of Fort Sill - \$5,000 for an audio-visual system at the Fort Sill National Historic Landmark and Museum and to develop an exhibit at the Field Artillery Museum.

Giddy Up 'N Go - \$5,000 to provide needed repairs and improvements to the horse stalls and to support free riding lessons for low-income families.

Lawton Community Theatre - \$4,980 to purchase microphone systems.

Lawton Public School Foundation - \$5,000 to purchase two smart boards for classrooms.

Operation Homefront Oklahoma - \$5,000 to provide 200 holiday food boxes for military families in the Lawton area.

Salvation Army Boys and Girls Club of Lawton - \$5,000 to provide a new recreation area in the Club's game room.

Matching Grants

In Fiscal Year 2011, the Lawton Community Foundation offered a Matching Grant program that awarded dollar-for-dollar Matching Grants up to \$5,000 to qualified nonprofits to support an existing endowment at the Lawton Community Foundation. The nine Charitable Organization Endowments listed below each received \$5,000 Matching Grants during Fiscal Year 2011, for a total of \$45,000 awarded through the program.

Arts for All
 Cache School Scholarship Fund
 Field Artillery OCS Alumni Chapter
 First United Methodist Church Foundation of Lawton
 Fort Sill Armed Services YMCA Gene Love Endowment
 Greater Lawton Rotary Club
 Lawton AMBUCS Lou Brox Endowment
 Lawton Food Bank
 United States Field Artillery Association Foundation

Giving Through the Lawton Community Foundation

Why it makes sense:

Tax Benefits – As an affiliate organization of the Oklahoma City Community Foundation, a 501(c)(3) public charity, gifts to the Lawton Community Foundation receive the maximum tax benefits allowed.

We Keep It Simple – By establishing a fund at the Lawton Community Foundation, you can avoid administrative burdens, legal complexities and compliance requirements associated with private foundations.

Flexibility – We accept a wide variety of gifts including cash, appreciated stocks, mutual funds and other marketable securities, life insurance policies, retirement plan assets and business-related assets such as closely held stock from S corp., C corp. and LLCs.

Cost Effective – The Oklahoma City Community Foundation provides all of our administrative and investment services. Under this structure, we are able to offer a wide range of services at a much lower cost when compared to operating a private foundation or similar entities.

Types of Funds You Can Establish:

Advised Funds – Donor advised funds are the simplest and most flexible option for donors to accomplish their charitable goals. We offer three options of Advised Funds: Legacy Fund, Gift Fund and Express Fund.

Legacy Fund – With a required minimum balance of \$10,000, a Legacy Fund is the best alternative for families or individuals who may be considering creating a private foundation. It offers both a proven investment management as well as administrative support including the handling of all required reporting.

Gift Fund – Established with a minimum gift of \$10,000, a Gift Fund is a less expensive and more effective alternative to commercial gift funds. A Gift Fund is ideal for the individual who wants investment performance and the ability to distribute the entire gift to a nonprofit organization or project.

Express Fund – With a completely spendable fund balance, an Express Fund is a perfect vehicle for individuals who want to make a year-end gift of cash, appreciated stock or another non-cash asset to benefit one or more charitable organizations. An Express Fund can be established with a minimum gift of \$1,000.

Charitable Organization Endowment Funds – The Lawton Community Foundation currently administers endowment funds for 28 charitable organizations. Through the program, the charitable organizations receive an annual distribution from their endowment and will receive an annual distribution for perpetuity. The endowments not only provide a reliable source of income to these organizations but also serve as a convenient way for donors to make contributions.

Scholarship & Award Funds – Established by individuals, corporations, alumni groups and civic organizations, scholarship and award funds are permanent endowments that provide support for those who are seeking to improve themselves through higher education or additional post-high school training. Scholarship and award funds can be established with a minimum gift of \$20,000. We currently administer four individual scholarship and award endowment funds.

Types of Gifts We Accept:

To make charitable giving as easy and flexible as possible, we accept a wide variety of assets. As a 501(c)(3) public charity, all contributions to us qualify for the maximum deductibility for income, gift and estate tax purposes.

Cash Gifts – A cash contribution can be in the form of cash, check, money order or cashiers check.

Credit Cards – Through a secure online giving website and in partnership with PayPal, we accept American Express, MasterCard, Discover and Visa. Use any of these cards to make a gift to an endowment fund at any time.

Real Estate – Gifts of real estate may be given at appraised value. If appreciated, capital gains tax may be avoided on the real estate appreciation if the property is contributed directly to a fund.

Business-Related Assets – Individually-owned business assets such as closely held C-corp. and S-corp. stock, partnerships and LLCs can be used to make a charitable gift.

Stocks, Bonds and Mutual Funds – Gifts of appreciated stocks, bonds and mutual funds can offer you significant tax savings while maximizing charitable contributions. We have accounts at most brokerage firms and can arrange for the transfer of the donated securities.

Oil and Gas Interests & Royalty Interests – The contribution of oil and gas interests may allow for the preservation of liquid assets while maximizing the charitable contributions.

Life Insurance – A life insurance policy can be an effective means to fund a charitable giving plan without significant outlays of cash. If the policy is gifted, you receive a tax deduction for the current cash value and future premiums could be funded with additional tax deductible contributions.

For more information on giving to the Lawton Community Foundation, please call 580/353-4747 or visit www.LawtonCF.org.

Giving Later Through a Planned Gift

A *planned or deferred gift* is a charitable gift made as part of a donor's tax or estate plan that may provide an income benefit to the donor or provide a tax deduction exceeding a single year. The Lawton Community Foundation can facilitate several planned giving options outlined below and we encourage anyone considering such a gift to discuss this option first with their professional advisor. For more information, please contact us at 580/353-4747.

Charitable Gift Annuities (CGA) are available for individuals age 55 years or older who want to make a gift with cash or other assets of at least \$20,000, receive income for life and, at the end of the annuity, have the remaining assets go to the endowment fund of their choosing. Six CGA options are available.

Charitable Remainder Trusts (CRT) allow an individual to place assets in a trust that pays annual income to the donor or a beneficiary for life or a term of years. In addition, the trust is removed from the estate, reducing subsequent estate taxes. Upon the trust's termination, the remaining assets will benefit an existing endowment or advised fund.

Charitable Lead Trusts (CLT) allow an individual to transfer assets to the Lawton Community Foundation in order to pay a

percentage of the assets' value to an endowment fund designated by the donor. At the end of the trust term, the remaining assets are passed on to designated beneficiaries. This option can provide discounted gift or estate taxes for the beneficiaries and, in certain cases, an income tax deduction at the time the trust is created.

Retirement Plan Assets can be used to establish an Advised Fund and reduce a potential tax burden on heirs. Your heirs can serve as advisors to the fund, ensuring that your charitable interests are continued into the future.

Bequests included in a will allow you to designate a percentage, the residual or the entire estate to benefit an existing fund or to establish a new fund. This option may provide you and your family with substantial reductions in federal estate taxes.

Lawton Community Foundation Distribution Policy: A Summary

The endowments created under the Lawton Community Foundation adhere to the distribution policy of the Oklahoma City Community Foundation. The policy permits endowments to capitalize on good investment years as well as protect them in low or negative return markets. Cash distributions from most of the endowment funds we administer are based upon a spending policy that calls for distributing 5 percent of the fund's average market value. The remaining investment return is left in the fund to increase the value, which protects future distributions from inflation. The annual distribution amount is based upon a rolling quarter average of the fund's market value. Effective FY2011 the number of quarters increased from eight to 12 thus further protecting the distribution from market fluctuations.

Investment Policy stabilizes economic impact on endowments

As an Affiliated Fund, the Lawton Community Foundation adheres to the Oklahoma City Community Foundation's investment policy. The policy is designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity. The investments need to allow the fund to generate distributions, grow to accommodate inflation and continue to exist in the future. The Trustees have adopted an investment policy that has four major objectives: capital preservation; inflation protection; continuing source of annual distribution for charitable purposes; and investment return in the top third of professionally managed funds.

As endowment fund investors, the Oklahoma City Community Foundation's Investment Committee has a perpetual horizon. Because of this horizon, we maintain a disciplined approach to long-term investment strategy while utilizing short-term tactical allocations to add value when there is opportunity. We also remain committed to a long-term diversification strategy with an allocation to high quality fixed-income assets even in times of booming equity investments.

Oklahoma City Community Foundation*: Investment Performance Pooled Investments as of June 30, 2011

	Year Ended June 30, 2011	Three Years Ended June 30, 2011	Five Years Ended June 30, 2011	Ten Years Ended June 30, 2011
EQUITIES				
Oklahoma City Community Foundation	32.36%	3.98%	3.79%	4.32%
S&P 500	30.68%	3.33%	2.94%	2.72%
FIXED INCOME				
Oklahoma City Community Foundation	4.08%	5.78%	6.21%	5.60%
Barclays Capital G/C Int	3.77%	5.75%	6.08%	5.34%
TOTAL RETURN				
Oklahoma City Community Foundation	21.57%	5.45%	5.23%	5.42%
65% S&P 500/35% Barclays Capital G/C Int	21.26%	4.90%	4.62%	4.07%

*The Lawton Community Foundation is an Affiliated Fund of the Oklahoma City Community Foundation and its assets are pooled with other endowment funds administered by the Oklahoma City Community Foundation for investment purposes.

The Lawton

Community Foundation

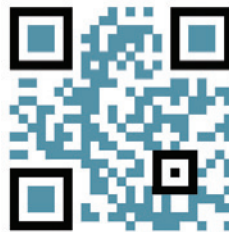
The Lawton Community Foundation
is an affiliate of the Oklahoma City
Community Foundation

P.O. Box 6033 • Lawton, OK 73506

Giving Back Has Never Been So Easy!

At the Lawton Community Foundation, we make it easy for you to make gifts to any endowment fund we administer through a secure, online giving service. We accept online gifts through the Oklahoma City Community Foundation's PayPal account, making it simple for you to make a gift with a MasterCard, Visa, Discover or American Express credit card at anytime.

Visit www.LawtonCF.org and select the "Make an online gift" button or use your smartphone's barcode reader app to scan the code at right and follow the step-by-step instructions. Once the gift is processed, donors will receive an electronic receipt from PayPal. You can also set up a recurring gift to automatically process through PayPal each month.



If you have any questions about making an online gift, please contact us at 580/353-4747. The process is easy, convenient and available 24/7!

www.LawtonCF.org

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The Lawton

Community Foundation

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