

community catalyst



Oklahoma City

Community
Foundation

Helping Donors
Help the Community

September 1997

St. John raises \$20,000 for scholarship endowment

❖ *Kirkpatrick Family Fund provides match for parochial scholarship in honor of 'the angel of the church'.*



Students get an early start on computer skills at St. John Christian Heritage Academy.

Over the years, the John Kirkpatrick family has offered matching grants to enable many non-profit organizations to build endowment funds at the Oklahoma City Community Foundation.

These matches can be a boon to many smaller non-profit agencies, who might not otherwise be able to raise the capital for a substantial endowment.

The St. John Missionary Baptist Church recently has raised more than \$20,000 for a matching grant to establish the Waltine Lynette Jackson Endowment Fund.

The endowment fund's earnings will be used to provide scholarships to students attending the St. John Christian Heritage Academy, a parochial elementary school affiliated with the church.

"We set up the Waltine Lynette Jackson scholarship in honor of Waltine, geared towards providing scholarships for those kids who are unable to attend our school because of financial difficulty," said Dr. M.L. Jemison, co-pastor of St. John Missionary Baptist Church.

Waltine Jackson was the daughter of the church's senior pastor, Dr. W.K. Jackson. She was

born and raised in the church and was active in the choir, Sunday School, the Women's Missionary Union and Baptist Training Union until her death in her late 40s.

"Waltine was the angel of our church," said Jemison.

"We have been able to secure funding [for the scholarship] from our members out of their compassion for Waltine and their sincere desire to see education brought up to a higher level."

Jemison feels the Academy is a prime example of the church's philosophy of holistic ministry.

"We minister to every facet of our congregation," said Jemison. "We take care of their spiritual needs, their social needs, as well as their physical needs."

The church has more than 66 auxiliary programs to minister to its members' needs, including the Academy. Many of the 110 students enrolled in the school are children of church members.

"The school was born out of the mindset of our pastor, who has spent his entire life contributing to the life of kids," Jemison said.

"In fact, the principal of our school, Penny Emery, is a by-product of this church. She was born and raised here, and we're quite proud of that — knowing that the legacy of our school will continue because we have individuals who themselves have benefited from the education element in our church."

The St. John Christian Heritage

Academy was established in 1989 to counter the "troubling elements in public education in our community," Jemison said.

Emery said that the lack of discipline and lack of academic challenges in many public schools are aspects that a private school education can address.

"A gifted and talented program [at a public school] is no comparison to a private school education," she said.

St. John begins computer instruction in pre-kindergarten, and teaches Spanish beginning in kindergarten.

Smaller class sizes and personalized instruction are also advantages Emery feels St. John can offer over public schools.

In addition, St. John is state accredited—something not all private schools can claim.

State accreditation means that

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Inside this issue:

- Designated Funds receive annual distributions
- Grants update: Schools join growing trend with butterfly gardens
- Memorial Funds provide lasting tributes

Community Foundation cultivates broad-based support for local agencies

The Designated Endowment Fund program is the oldest and broadest-based program at the Oklahoma City Community Foundation for increasing community capacity. The program has attracted the majority of our donors and represents the clearest understanding of the Community Foundation as it relates to both donors and other non-profit agencies.

While many community foundations have agency endowment funds, our program represents the largest number of these funds at any community foundation in the United States. A primary building block of this program

has been the willingness of John and Eleanor Kirkpatrick and their family of funds to provide matching dollars for non-profit organizations as an incentive to build endowments.

The Community Foundation has been an advocate for endowment development in Oklahoma City and has created investment, distribution and administrative policies that allow these funds to grow through investment performance and through the encouragement and interest of our donors.

It is our desire to be considered a major resource as well as a benchmark for charitable endowment management in

this community.

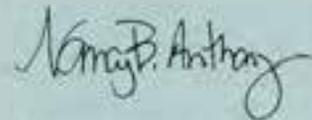
This year, at our annual Designated Fund meetings



...from the
**Executive
Director**

September 22-25, we will distribute \$1.37 million to more than 200 local agencies.

This amount represents a substantial source of support for the work of Oklahoma City's non-profit agencies. Indeed, it is a major focus of our mission to provide an atmosphere that fosters endowment growth and agency capacity building within our community.



Community Foundation Highlights

❖ **Year-End Fiscal Highlights**

The net assets of the Oklahoma City Community Foundation reached \$247,211,267.00 at fiscal year end (June 30, 1997), and the total investment return for the year was 19.43 percent. The Community Foundation has received \$71,526,901.00 in new contributions during fiscal 1997. The audited financial statements for fiscal 1997 will be available in the Annual Report, which will be published in early November.

❖ **Directory of Oklahoma Foundations available in October**

The sixth edition of the Directory of Oklahoma Foundations will be available in October. The directory is the most complete resource on grant-making foundations, and contains profiles on more than 230 Oklahoma foundations. The information is compiled from the latest available 990PF tax returns filed by private foundations with the state attorney general.

Each foundation profile lists the foundation's assets, income, total grants

made with range and average size, board of trustees and various information about the foundations' funding interests and restrictions.

The directory also contains several indices, including a geographic listing, program area listing and trustee listing.

Cost of the directory is \$25 for up-front cash payment, or \$30 with a purchase order. Send inquiries or orders to: Foundation Research Project, P.O. Box 1146, Oklahoma City, OK 73101-1146, or call 405/235-5603.

❖ **Revised grant guidelines available**

The Community Foundation has recently completed a review of its grant guidelines and application procedures. Revised guidelines are available for each of the five community programs: the Fund for Oklahoma City, the Margaret Annis Boys Trust, After School Options, Community Gardening and the Agency Capacity Building program. If you would like a copy of any of these guidelines, please contact Susan Elkins at the Community Foundation office, 405/235-5603.

❖ **Community Foundation announces new officers for FY 1997-98**

The Community Foundation recently announced its new officers for fiscal year 1997-98. Trustee officers are President of the Board William O. Johnstone and Vice Presidents Jeanette L. Gamba and James H. Holloman, Jr.

The Community Foundation owes a debt of gratitude to Ed Barth, who served as President of the Board of Trustees from July 1994 to June 1997.

Non-Trustee officers are John L. Belt, secretary and general counsel, Marilyn B. Myers, assistant secretary, Nancy B. Anthony, assistant secretary and executive director, Eleanor J. Maurer, treasurer, and Carla Pickrell, assistant treasurer and director of administration.

❖ **New staff members**

Three new staff members recently have been hired at the Community Foundation. Louie Jameison and Sarah Pool are our new administrative assistants, and Charlotte Cooper will arrive in October as the director of asset development. ❖

Designated Fund program provides annual income for more than 200 community agencies

❖ **Designated Endowment Funds receive \$1.37 million in distributions.**

The Oklahoma City Community Foundation held its annual Designated Endowment Fund meetings September 22-25, where more than \$1.37 million was distributed to community agencies.

The Community Foundation manages 256 endowment funds for area non-profit organizations through this program.

The Designated Fund program provides a simple and efficient way for a non-profit to have an endowment fund. It provides a common fund into which many donors can contribute and management services including investment oversight, acknowledgment to donors and annual cash distributions.

Matching grant programs from outside donors and the Community Foundation's investment and administrative policies have helped build this pool of funds to a combined value of more than \$31.1 million.

The Community Foundation has placed an emphasis on building the Designated Fund program, especially over the past five years, because we believe it is the most basic way to strengthen the community. By maximizing the resources available to the non-profit agencies whose endowments we manage, we can help ensure that they will be around to serve the community for years to come.

Between 1992 and 1994, a series of three matching programs were offered to Designated Funds with the support of the John Kirkpatrick family to stimulate the growth of many of the smaller funds. The total increase in donations from these challenges was \$3.2 million into more than 100 funds.

Followed by the stock market increase from 1995 to 1997, the growth of the Designated Funds has been substantial. During that period, the total fund value increased from \$13.5 million in 201 funds to \$31.1 million in 256 funds.

New funds accounted for \$2.5 million of this growth and existing funds received \$15.1 million.

The growth of current individual funds that were in existence in 1989 is substantial. The average fund that was in place in 1989 has increased in value from \$57,570 in 1989 to \$152,027 in 1997.

The average distribution of funds in

Designated Fund Program Facts At-A-Glance

(All funds included)	1992	1997
Total Assets of Program	\$13.5 million	\$31.1 million
Total Number of Funds	201	256
Average Fund	\$67,341	\$121,485
Average Distribution	\$3,793	\$5,380
Total Program Distributions	\$739,735	\$1,377,400
Distributions of \$1,000+	130	216
Donated Capital as a % of Fund Value	88%	62%
Average Return on Donated Capital in Cash Distribution	6.47%	7.18%

Average Individual Fund Growth (After Distribution)



place since 1989 has increased from \$3,800 to \$6,832, and donated capital as a percent of total fund value has gone from 100 percent in 1989 to 60 percent in 1997 for those funds.

The importance of an appropriate long-term investment management program to endowment fund management is illustrated by these results.

The Community Foundation's total investment performance for fiscal year 1997 was 19.43 percent. The three year investment performance is 18.16 percent and the average performance for the past five years is 12.32 percent.

Cash distributions are based on a spending rule which is 5 percent of the average market value for the previous eight quarters. For 1997, this produced an average return on donated capital of 7.18 percent.

The spending rule ensures a stable earnings stream as well as a policy of inflation protection.

Because of the high rates of return achieved during the past three years, the spending rule has allowed the cash distribution to increase by 64 percent

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Butterfly gardens make learning process take flight

❖ **Local schools hope to raise test scores and increase excitement with butterfly gardens and outdoor classrooms.**

Returning to school is usually the last thing kids want to do in late August after a summer filled with vacations, Nintendo marathons and trips to White Water, and void of textbooks and classrooms.

But imagine kids who are eager to return to school, knowing that something has been waiting for them all summer and will be even bigger and better than when they left last spring.

Several local schools are hoping outdoor butterfly gardens will help make learning fun, and in the meantime will help raise test scores and instill in students a love for science and nature.

Butterfly gardens are a hot trend in education today. The Oklahoma City Community Foundation has awarded grants to six schools for butterfly gardens or outdoor science labs since 1995. The grants are funded through the Margaret Annis Boys Trust, a beautification and landscaping program of the Community Foundation.

The Boys Trust was established in 1991 when Miss Boys, an Oklahoma City native and longtime educator, left her estate to the Community Foundation for the beautification of public lands in the Oklahoma City area. Since that time, the

Community Foundation has granted more than \$388,000 to beautify various locations around the area, many of which have been school campuses.

Schools receiving Boys Trust grants must raise matching funds and provide volunteer labor, and must produce a plan for the long-term maintenance of the project.

Butterfly gardens contain special plants to attract, host and feed butterflies through the stages of their development from caterpillars to full grown butterflies. These plants include "butterfly bushes," shasta daisies, marigolds, azaleas, milkweed and various herbs and other fragrant foliage.

Not only do the butterflies provide material for teaching about the cycles of nature, but the process of planting a garden and watching it grow is a new experience for many children.

Three of the schools that received a grant started planting this spring and maintained the gardens over the summer with the help of core groups of students, teachers and parents. The students who left the newly planted gardens in the spring will return to find flourishing gardens, with five and six foot butterfly bushes in some cases.

"Most kids haven't seen something grow from start to finish before," said Sharry Vaeth, principal of Indian Meridian Elementary School in the Choctaw-Nicoma Park school district.

"This gives them a greater appreciation of our environment, an appreciation of life cycles and the complex cycles of nature."

Mindy Britten, a sixth grade science teacher at Western Oaks Middle School in the Putnam City school district, said that some kids who helped put in that school's butterfly garden had never planted anything before. Some even tried to plant the plastic pots along with the trees they contained, and several didn't know what mulch was, she said.

Britten and Dan Mills, a sixth grade social studies teacher at Western Oaks, got the garden started in April, in part to help landscape the new sixth grade building, and to get students involved and create a nice place to have class outdoors. They are encouraging teachers in other disciplines, such as art and home economics, to incorporate the garden into their lesson plans.

Vaeth said one objective of Indian Meridian's butterfly garden is to raise test scores in science. She thinks one reason



Students at Washington Irving Elementary School's butterfly garden, with Dale Levy, the Community Foundation's director of community programs.

butterfly gardens are becoming so popular is that science and math have historically been under-emphasized, and this is a fun way to provide a hands-on illustration of the principles of natural science.

"It makes science make sense. It provides a hands-on way of increasing what we retain from education," she said.

Cheryl Coffelt, a special education teacher at Washington Irving Elementary School in Edmond, sees their butterfly garden as a multi-discipline learning environment, especially for children who may learn in non-traditional ways.

"I thought this garden would be an excellent opportunity for my 'learning difference' kids, to integrate them with other kids, to provide a different type of learning experience through hands-on science, language arts, writing and math opportunities, and also to help boost their kids self-esteem," Coffelt said. "But this is something that all the grades can participate in and benefit from," she said.

Washington Irving has formed a special "Wow Team" comprised of fifth graders who had to commit to working in the garden one day a week during the summer and learn to be garden tour guides for other students and parents. Crooked Oak will also form a special group of students responsible for its garden's maintenance. Indian Meridian will divide the weeding and watering responsibilities among the grade levels, Vaeth said.

Coffelt said the garden project has not only created excitement for the students,

Margaret Annis Boys Trust Grants for Butterfly Gardens or Outdoor Classrooms:

- **Northridge Elementary School, Putnam City**
- **Tulakes Elementary School, Putnam City**
- **Western Oaks Middle School, Putnam City**
- **Washington Irving Elementary School, Edmond**
- **Indian Meridian Elementary School, Choctaw-Nicoma Park**
- **St. Mary's Episcopal School, Edmond (independent)**

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Designated Funds

...continued from page 3

from 1989 to 1997 before any additional contributions are included.

A \$5,000 fund started in 1989 would be valued at \$9,024 in 1997 and would have had cash distributions of \$2,760 during the eight year period. This is a total return of more than 133 percent in distributions and increased value.

Had the \$5,000 been invested in an 8 percent fixed income investment, it would have returned cash distributions of \$3,200 and no investment appreciation. The is a total return of 64 percent for the same eight year period.

By sacrificing \$440 in cash distribution, the

fund has gained \$4,024 in appreciated value.

The annual cash distribution from the spending rule now exceeds the fixed 8 percent return and will continue to increase in the future.

The \$1.37 million in distributions that the Community Foundation distributed at the annual Designated Fund meetings represents more than 28 years of the foundation's commitment to providing opportunities for donors' contributions to grow both in value and impact within the community. ❖



Butterfly Gardens

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it has provided an inspiration for her, after 24 years of teaching.

She sees many ways the garden can inspire learning, from watching the butterfly's life stages to watching the life stages of worms in their compost pile, to watching the flowers grow and harvesting seeds when the seasons change.

"This will truly keep giving and giving and giving over the years," she said.

Vaeth hopes the garden will promote a sense of school and community ownership of the school's campus.

Children, teachers, parents and school staff have all worked together in planting

the gardens at all three of these schools and put in many volunteer hours over the summer to keep the gardens thriving for the beginning of school in August.

"We need to find more ways to make kids want to come to school and to get parents and the community involved with the school," Vaeth said. ❖



'Story stones' guide visitors through the garden at Washington Irving.

St. John

...continued from page 1

students do not have to test into a new school after completing sixth grade at St. John.

Emery said that most St. John graduates go on to attend other private schools or magnet schools, or become honor students in an independent school district like the Millwood School District.

Emery said a major focus at St. John is encouraging students to attend college.

"The school is only eight years old, so we haven't had too many kids reach

college age yet," Emery said. "We expect that a majority of our graduates will eventually go on to college."

Jemison hopes the scholarship fund will be the first step for many students on the road to a college education.

"We are more than grateful to the foundation for their generosity and their kindness," Jemison said. "[The match] was a motivation for us, and hopefully we'll be able to help several young people with their educational development." ❖

Mission Statement

The mission of the Oklahoma City Community Foundation, a non-profit public charity, is to serve the charitable needs of the Oklahoma City area through the development and administration of endowment funds with the goal of preserving capital and enhancing its value for the benefit of the Oklahoma City area.

The mission will be fulfilled by pursuit of these goals:

- Provide convenient, efficient and effective ways through which donors can contribute assets to charitable purposes.
- Encourage donors to create funds which 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 the Funds for Oklahoma City, restricted and unrestricted community endowments, which can be used by the Trustees and the community to develop, coordinate and enhance services and programs which meet the changing needs of the community.

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 Sam Bowman, *Director of After School Options*
 Tammy Davis, *Comptroller*
 Susan Elkins, *Grants Administrator*
 Leslie Griffith, *Assistant Comptroller*
 Louie Jameison, *Administrative Assistant*
 Laura Lang, *Communications Coordinator and CATALYST editor*
 Dale Levy, *Director of Community Programs*
 Carla S. Pickrell, *Director of Administration*
 Sarah Pool, *Administrative Assistant*
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Memorial Funds provide a lasting tribute to loved ones

Memorial Funds can provide a lasting tribute to the charitable interests of a special person. The contributions of many donors can be accumulated in one fund and annual earnings distributions made in memory of the named person.

Memorial gifts can be made to the Community Foundation in any amount and the donor can designate as beneficiary any non-profit agency Designated Endowment Fund, any area of interest fund, or the Fund for Oklahoma City. Naming the Oklahoma City Community Foundation as the recipient of memorial gifts frequently provides a start for many memorial funds.

A Memorial Fund that is part of a permanent endowment provides ongoing support for a charitable purpose and thus perpetuates an individual's memory.

Memorial gifts made through the Community Foundation provide the following services for donors:

- The gift is promptly and appropriately acknowledged to surviving family or friends as well as to any beneficiary organization;
- Gifts can be made to benefit many different organizations through one fund;
- A single contribution can be made in

memory of several individuals;

- All memorial gifts become part of the permanent endowment of the Community Foundation and provide perpetual support a specific organization or a field of interest;

- The Annual Report of the Community Foundation describes each fund and gives recognition to the memorial throughout the entire community.

The following three Memorial Funds, which have recently been established, provide examples of how the Community Foundation can help perpetuate a loved one's memory and their charitable interests.

The **Dianne Gumerson/Overholser Mansion Fund** was established in memory of Dianne Gumerson by her family and friends after her death in April 1996. Gumerson was a longtime volunteer supporter and past chairman of the Overholser Mansion, which is the beneficiary of this fund.

The family of the late J. Landis



Dianne Gumerson



J. Landis Fleming



Jane B. McMillin

Fleming established the **J. Landis Fleming/Oklahoma City Philharmonic Orchestra Fund** after his death in January of this year. Fleming, a musician and music teacher for many years, became a journalist in 1945, and he continued to boost public awareness of music and the arts for the next 45 years.

The **Jane B. McMillin/Casady School Primary Division Fund** was established in memory of McMillin by her family after her death in August 1996. She was a longtime teacher at Casady School and was president of Rainbow Fleet at the time of her death.

For more information about Memorial Funds, contact Nancy Anthony, executive director, at 405/235-5603. ❖

Community Program Proposal Deadlines

After School Options
October 15

Agency Capacity Building
October 15

Margaret Annis Boys Trust
October 15

Community Gardening
October 15

Fund for Oklahoma City
November 15

Groups interested in these programs should contact **Susan Elkins** for guidelines, or **Dale Levy** to discuss proposals for collaborative projects, at 235-5603. Contact **Sam Bowman** to discuss After School Options projects at 235-4325.



Oklahoma City

Community Foundation

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