



First Quarter 2001

Community Responds to Tragic Death Of Two Law Enforcement Officers

When two law enforcement officers were killed in a horrifying, head-on car crash Aug. 31, the community was quick to respond. Highway patrol trooper Matt Evans and Oklahoma City Police Department officer Jeffrey Rominger, independently pursuing a fleeing vehicle with two occupants, collided on Interstate 40 in Oklahoma City. The suspect vehicle and one of the officers was traveling the wrong way on the divided highway. Trooper Evans, officer Rominger and the two occupants in the eluding vehicle were all killed in the crash.

In the hours that passed after the wreck, it was learned that some trooper cruisers were not equipped to communicate with the Oklahoma City police radio system. The revelation shocked some, angered others, but it also inspired the creation of the Special Trooper Radio Fund at the Oklahoma City Community Foundation.

Jay Dunham, with Tyler Media, was among the first to take action. One of his earliest calls was to the Community Foundation. The foundation quickly agreed to act as trustee and handle all the necessary acknowledgements and ...continued on page 2



Copyright 2000, The Oklahoma Publishing Company
Oklahoma Highway Patrol Capt. Mike Grimes, left, and patrol Chief Gary Adams look at a new radio unit for trooper patrol units. Public Safety Commissioner Bob Ricks, right, also was on hand. The fund was established in honor of slain Oklahoma City police officer Jeffrey Rominger and trooper Matt Evans.

Pilot Program Grows Into Major School Beautification Initiative

At first blush, it seems such a daunting task: beautifying the campuses of more than 160 public and independent elementary schools in Oklahoma County. What organization could take on this logistical challenge? What organization *would* take on a program where no two beautification plans were the same? Is it possible to mobilize both residents and business leaders in an effort to beautify entire neighborhoods?

These were but a few of the questions raised as the Oklahoma City Community Foundation waded into the pilot program called "Clean and

Beautiful Schools." As part of its major beautification programming initiative, C&B Schools taps the talents of program officer Brian Dougherty and Community Foundation staffers Wanda Minter and Mary Reneau – along with considerable advice from other plant material experts, school maintenance personnel, teachers and students.

The result is an incredibly high-energy program that is answering a lot of questions while living up to all its expectations. The program is built around the concept that the safety, function ...continued on page 2

Inside this issue:

- Nearly **\$1.5 Million** committed to Community Appearance
- New **Endowment Funds** support a range of local charitable activities.
- Grants update: **Trustees act** to fund a variety of program initiatives.

Pilot Program

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Students perch on a sitting wall of an outdoor classroom that resulted from the Clean & Beautiful Schools plan for North Highland.

and appearance of school grounds contribute to a positive learning environment. In addition, elementary schools are widely disbursed through the community and represent the broad potential impact that the Community Foundation and its corporate partner, OGE Energy Corp. (OGE) seek.

"Through OGE Energy Corp.'s 'Green Team,' OGE Energy works to enrich Oklahoma's natural resources and expand environmental awareness. We are excited about this cooperative effort with the Community Foundation," said Jan Kunze, coordinator, Environmental Health and Safety for OGE Energy. "We believe Clean and Beautiful Schools will provide a chance to improve the appearance and functionality of school property while also promoting a better understanding of the public's role in environmental stewardship."

Other partners in the project include the John E. Kirkpatrick Horticulture Center at Oklahoma State University (OSU) – Oklahoma City, the OSU County Extension Service and Master Gardeners of Oklahoma County.

The poster-child success story for this program is North Highland Math and Science Academy, where a wide array of community resources has come to bear on beautification and cleanliness.

The Community Foundation provided the leadership for this effort by helping teachers, administrators, maintenance personnel, parents and neighborhood association representatives identify priorities and by developing the beautification plan. The foundation also provided some financial support for implementing certain elements of the plan. The Kirkpatrick Family Fund at the Community Foundation provided a boost by helping to fund the construction of a sitting wall for an outdoor classroom.

As North Highland has proven, many other sources of funding and in-kind support can be recruited when a clear, common sense plan has been developed. Every entity involved, including the Oklahoma Publishing Company (OPUBCO), Haskell Lemon Construction Company, Nichols Hills United Methodist Church, Christ the King Church, TLC Nursery and the Highland Hills Neighborhood Association had a unique role to fill.

"A most significant element of the Clean and Beautiful Schools program is the Foundation and framework it provides for businesses and a variety of organizations to become involved," said Dick Dugan, OPUBCO director of marketing services.

"The program ignites synergy. Brian Dougherty's professional experience and contagious enthusiasm is a key asset and makes the project tick," Dugan added.

At North Highland, 17 trees have been planted to date and 16 others are scheduled for installation in the next few weeks, a 2,000-square-foot outdoor classroom, butterfly garden and corresponding educational curriculum have been created, litter control has been stepped up thanks to the involvement of students, an unsafe paved area has been removed and neighborhood appearance in general has taken a higher priority.

One unique element of C&B Schools is its "Maintenance Network." Maintenance personnel are involved from the very beginning of the beautification plan development. Three times a year, the Community Foundation organizes workshops that bring together school maintenance workers to share success stories and participate in continuing education on such topics as tree trimming, control of sand burrs on playgrounds and considerations in playground safety.

The Community Foundation is planning to sign up about 45 schools per year as C&B Schools participants. For information on the program, contact Mary Reneau at the Community Foundation, (405) 235-5603.

"Our community owes a tremendous amount of gratitude to the Oklahoma City Community Foundation for a program that not only improves our schools today, but also will have an impact for many years to come," Dugan said.

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Trooper Radio Fund

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other administrative duties. The foundation's involvement left Jay free to raise the kind of awareness and financial support that he hoped would prevent another tragedy through improved communication equipment.

On both fronts, the Special Trooper Radio Fund has proven successful. For the short term, donors provided funding to buy 26 new radios for the Highway Patrol. Over the longer term, Jay and others have raised the issue to a high priority. Legislators, other public officials and some taxpayers have voiced support for doing what it takes to adequately equip remaining Highway Patrol cruisers.

Trustees Approve Quarterly Grants

In December 2000, the trustees of the Oklahoma City Community Foundation approved 20 grants that totaled more than \$123,000 for four programming areas.

After School Options

Arts Council of Oklahoma City, \$16,320 to assist with coordination and administration of an arts-after-school program.



A grant to the Arts Council provides an Arts Coordinator for After School Arts programs

Junior Achievement, \$2,600 to assist with the purchase of learning kits to teach practical life skills and how communities work during YMCA after-school programs.

Oklahoma Institute for Child Advocacy, \$5,000 to conduct four training sessions for churches interested in starting or expanding after-school programs.

Generation X Foundation, \$3,000 for a five-day-a-week program at the Northwest Praise Center.

Evangelistic Baptist Church of Christ, \$3,000 for a three-day-a-week character development and education enrichment after school program.

South Lee United Methodist Church, \$1,500 for a Wednesday evening enrichment program.

Roosevelt Middle School 21st Century Learning Center, \$1,500 for the cost of one instructor for a health education and community service after school enrichment activity.

Integrus Western Village Charter School, \$2,500 to purchase books through the Scholastic Books Program for after school programs.

Agency Capacity Building

Oklahoma Foundation for Excellence, \$5,000 for purchasing five new computers and software.

Red Lands Council of Girl Scouts, \$4,377 for registration, travel, meals and lodging for six staff to attend training.

The Tree Bank, \$2,000 for consultant fees for a strategic plan.

Allied Arts Foundation, \$4,835 to purchase a new server and one fully equipped computer.

Sugar Creek Camp, \$1,875 for assistance with consulting fees for a strategic plan.

Child Abuse Response Center, \$2,984 to purchase one fully equipped computer, scanners, printer and network upgrades.

Fund for Oklahoma City

League of Women Voters of Oklahoma County, \$4,000 for publishing materials in Vietnamese regarding citizenship and voter registration.

After School Options, \$30,000 for a small grants program to improve parental involvement at 10 elementary schools.

Mayfair Center, \$10,000 for a facilities plan.

Margaret Annis Boys Trust

Hoover Middle School, \$6,600 to assist with a comprehensive tree planting on the campus.

Capitol View Neighborhood Association, \$9,500 to replace and plant trees at Northeast High School.

Oklahoma State University, Oklahoma City Branch, \$7,000 for landscaping around new access road to the campus/fitness area.

Nearly \$1.5 Million Committed to Community Appearance

The Clean and Beautiful Schools program is one element of the Community Foundation's commitment to improving community appearance. The total commitment – exclusive of cash contributions by other groups, in-kind and administrative support and the value of maintenance – is nearly \$1.5 million through 2005. Funding is generated internally or from direct donor support.

This "million dollar commitment" includes funding the following:

VIEW-Scape \$200,000

Funding for the development of a plan to improve the view from Interstate highways in Oklahoma County and to initiate an improvement project.

Park Programs & Facilities \$100,000

Funding to improve appearance of public parks.

Highly Visible Projects \$50,000

Beautification projects that focus on improving public land located on main streets and intersections.

Park Study and Planning \$50,000

Conduct an inventory and economic development study of parks in the Oklahoma City area.

Clean & Beautiful Schools \$635,000

Addresses needs at 150 elementary school sites in Oklahoma County over a four-year time frame.

Margaret Annis Boys Trust \$400,000

Provides funding for beautification projects on public property in Oklahoma County.

Creating a Community ... One Dream at a Time

Charles Guyton Anderson, III

With a tip of his hat and a ready smile, Charles Guyton Anderson, III (see photo on the right) would greet passersby in his beloved Putnam Heights neighborhood in Oklahoma City. His neighbors have missed Guyton's bright presence since his death in November of 1998. But like so many other Community Foundation donors, his gift keeps giving to the community and neighborhood he loved.

A Renaissance man with an educational pedigree to match, Guyton left his calling call all over the world. After receiving two degrees, studying as a Fulbright Scholar, mastering seven languages and teaching French and Latin for 35 years in the Washington, D.C. area, Guyton came home to live in his parents' house in Oklahoma City.

He continued a family tradition of

celebrating New Year's Day with the Black-Eyed Pea Party that drew all ages of family friends.

He also proudly followed in his mother's footsteps by generously volunteering his time to the Putnam Heights Neighborhood Association. His dream was to make Putnam Heights a premier neighborhood, a prestigious address, one resident recalled.

As if to underscore the importance of a local neighborhood to this world traveler, Guyton directed the proceeds from the sale of his home to fund an endowment. The Community Foundation received the proceeds from the sale of the property and will handle the mechanics of administering the fund. As a result, Guyton's generosity will benefit the Putnam Heights Preservation Area, which is working for



the dream he had for his community. The gesture, one person noted, is a reflection of the man himself.

"His last generous gift to his neighbors and his neighborhood – the home he grew up in – will benefit all of us for years to come. Many have uttered the words, 'Love thy neighbor,' without really understanding what they meant. Charles Guyton Anderson, III, lived those words every day of his life."

New Endowments Support Local Charitable Activities

The Designated Endowment Fund program has provided non-profit organizations a way to build endowment funds for more than 25 years. A Designated Endowment Fund can be started by donors to benefit a non-profit organization, or by the organization itself, with an initial contribution of \$20,000.

Very simply, an endowment fund is a permanent fund that generates income for an organization or charitable purpose in the present and provides for its future needs as well.

The following designated funds have been added since the end of fiscal year June 30, 2000.

MIDWEST CITY-DEL CITY PUBLIC SCHOOLS FOUNDATION FUND

The fund will secure and distribute contributions from individuals, families, corporations and foundations for the benefit of the students of Mid-Del schools.

NATIONAL MULTIPLE SCLEROSIS SOCIETY FUND, OKLAHOMA CHAPTER

The fund will support services for Oklahomans with multiple sclerosis and their families. It also educates the public about the disease and the needs of the people with multiple sclerosis.

Board Member David Surgnier & "James," his beloved service dog at the Multiple Sclerosis Oklahoma City Walk 2000.





Lil Williams, founder and former president of Oklahoma Community Theatre Association.

OKLAHOMA COMMUNITY THEATRE ASSOCIATION- LIL WILLIAMS FUND

The fund perpetuates the memory of Lil Williams, founder and former president of OCTA, by encouraging theatre development, advancement and interest. The fund will financially assist theatres to participate in the statewide play festival.

OKLAHOMA HERITAGE ASSOCIATION- GARY & ELIZABETH HUCKABAY SCHOLARSHIP FUND

The fund promotes enhanced pride in Oklahoma by establishing a scholarship competition open for high school students in Canadian County. The competition will be objective and deal with the history and geography of Oklahoma. The scholarship will honor Gary and Elizabeth Huckabay for their years of involvement with the Oklahoma Heritage Association.



Long-time Community Foundation supporters Elizabeth and Gary Huckabay chose to fund a scholarship to accomplish one of their charitable giving goals.

Thousands of people participate in the Annual Red Bud Classic, which is held in the spring.



REDBUD FOUNDATION FUND

This fund will support the Foundation's efforts to provide Oklahoma City community members with an opportunity to become involved through fitness, fun and philanthropy. The foundation will also sponsor an annual 10K run through northwest Oklahoma City.

STILLWATER MUSEUM ASSOCIATION- SHEERAR MUSEUM FUND

Established to support the Florence J. and Russell H. Baugh Educational Endowment Fund at the Sheerar Museum, which is dedicated to increasing public interest in and knowledge of the history of Stillwater, Okla., from the territorial period to the recent past.

UNIVERSITY OF CENTRAL OKLAHOMA- DEPARTMENT OF HISTORY AND GEOGRAPHY - DIANE NEAL KREMM FUND

The fund was established in honor of Dr. Diane Neal Kremm for her long-term service as a teacher and mentor to the university. It will assist outstanding history and geography students and faculty members with developmental and research expenses.

The Lawton Community Foundation has been established to support the charitable interests and concerns of the people of the Lawton community and surrounding areas. The LCF was founded through initial funding from the community-owned Lawton Retail Merchants' Association. It is affiliated with the Oklahoma City Community Foundation.

The LCF's structure ensures that Lawton's cultural, artistic, educational and charitable work will have a lasting source of funding from which future generations will benefit. The following are new LCF funds.

ROBERT E. GREINER SCHOOL FOR THE HANDICAPPED OF COMANCHE COUNTY FUND

The fund supports the operation of the Robert E. Greiner School for the Handicapped, Inc., which focuses on instruction for handicapped adults. The school provides educational classes including basic reading, writing, math, personal hygiene, cooking, music and physical education.

ON THE CHISHOLM TRAIL- HERITAGE CENTER FUND

The fund supports the operation of the Chisholm Trail Heritage Center in Duncan, Okla. The Heritage Center was dedicated to commemorating and celebrating the great cattle trails of the 19th century, particularly the Chisholm Trail.

LAWTON PUBLIC SCHOOL FOUNDATION

The fund supports the need to improve the quality of education in the Lawton area schools by forming a partnership with the Lawton area schools.

Consider This: Is a Charitable Gift Annuity Right for You?

If you are considering ways to increase your yield from appreciated stock, a charitable gift annuity might be for you. A charitable gift annuity is a simple, flexible transaction that can benefit both a donor and the community.

A charitable gift annuity is a transaction in which an individual contributes cash or property to a charitable organization, such as the Oklahoma City Community Foundation, in exchange for the charity's promise to make fixed annuity payment to one or two life annuitants.

As the name suggests, there are two elements to the charitable gift annuity. First, the donor receives an income tax deduction equal to the present value of the remainder interest in the property transferred. Second, the donor(s) receives a fixed income annuity for the remainder of his life or joint lives.

The taxability of the annuity payments will depend on several factors including the basis of the property transferred. Generally, if long-term capital gain property is transferred, the gain on the property is recognized over the life of the annuity. Each year, the charity reports the taxability of the annuity payments to the annuitant on Form 1099-R.

The rates paid on charitable gift annuities depend upon the age of the annuitants. The Oklahoma City Community Foundation uses the rates recommended by the Council of Gift Annuities.

Consider how a charitable gift annuity can be used as a simple tool to increase the yield on appreciated assets. A couple, ages 77 and 75, have stock held more than one year with a \$50,000 fair market value and a basis of \$10,000. They would like to increase their income from the stock and support their favorite charity. The stock currently pays dividends of \$190 per year. They enter into a charitable gift annuity transaction with the Oklahoma City Community Foundation. The Community Foundation agrees to pay them 7.4% or \$3,700 per year in equal installments for a \$50,000 charitable

gift annuity contract established using the appreciated securities.

whether a charitable gift annuity contract is right for you.

Description	Keep the stock	Purchase a Charitable Gift Annuity
Fair Market Value of Stock	\$50,000	\$50,000
Charitable Income Tax Deduction	\$ 0	\$18,641
Income Tax Savings	\$ 0	\$ 5,779
Net Cost of Transaction	\$50,000	\$44,221
Gross Annual Cash Flow	\$ 190	\$ 3,700
Yield on Investments	.38%	7.40%

By establishing a \$50,000 charitable gift annuity contract with the Community Foundation, the donors receive an income tax deduction of \$18,641 and increase their investment yield from .38% to 7.4%.

At the termination of the annuity contract, the remainder interest, estimated to be \$18,641, can be used to support the donor's favorite charitable organizations, purposes or causes through the Community Foundation. The remainder interest can also establish a donor-advised fund with the donor's children acting as the fund's advisors.

A charitable gift annuity can be established to benefit the donor or someone other than the donor – another family member, for example.

The Community Foundation staff is pleased to work with you and your financial advisor to determine if a charitable gift annuity is right for you. If you would like to learn more about charitable gift annuities, please contact Donna McCampbell at d.mccampbell@occf.org or visit our the Planned Giving Design Center (PGDC) on our web site, www.occf.org.

The PGDC provides comprehensive information about planned giving as well as on line calculations for estimating the tax implications of a charitable gift annuity and other planned gifts. The PGDC is free to all users, but registration is required. Investigate the PGDC and determine

Fast Facts:

The Oklahoma City Community Foundation has come a long way in its 30-plus years. Its first annual report showed a net worth of \$45,299 from one major donor. At calendar year-end 2000, assets exceeded \$421 million and donors numbered in the thousands. The Oklahoma City Community Foundation is now the nation's 20th largest U.S. community foundation in terms of asset size.

Some other indicators of the breadth of the Community Foundation include:

- servicing 300 agency endowment funds, comprising assets of \$115 million and spinning off \$6 million in income to agencies;
- handling 175 donor-advised grant-making funds, with assets of \$240 million and distributions of \$12 million;
- operating the largest independent scholarship program in the state, which has grown from 20 five years ago to more than 300 annual scholarship recipients;
- administering 90 unrestricted funds with a total value of \$14 million and \$700,000 in annual distributions.



New trees will take root on the North Highland campus... thanks to Clean & Beautiful Schools.

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 community.

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.

Is Your Neighborhood School Part of The Clean & Beautiful Program?

Tier I - Spring 2000

Sunset Elementary
Prairie Vail Deer Creek
Putnam Heights
St. James Parochial

Sooner Rose Mid Del
Corpus Christi Parochial
Madison Elementary
North Highland

Tier II - Fall 2000

Arcadia Elementary
D.D. Kirkland Elementary
Lake Park Elementary
Hilldale Elementary
Rollingwood Elementary
Grace Christian
Apollo Elementary
Northridge Elementary
Millwood Elementary
James L. Dennis
Harvest Hills Elementary
Coronado Elementary
Taft Middle School

Kaiser Elementary
Council Grove Elementary
Monroe Elementary
Columbus Elementary
Wiley Post Elementary
Central Intermediate School
Will Rogers Elementary
Mid-Del Christian School
Life Christian School
Windsor Hills Elementary
Ralph Downs Elementary
Central Elementary

Tier III - Spring 2001

West Nichols Hills Elementary
St. Charles Borromeo
Chisholm Elementary
Creston Elementary
Nichols Hills Elementary
Adams Elementary

Britton Elementary
Crutcho
Villa Teresa
Lafayette Elementary
Quail Creek Elementary
Tulakes Elementary

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Jeanette Gamba to Lead Board of Trustees

Advertising executive and community leader Jeanette Gamba is serving as president of the Oklahoma City Community Foundation's board of trustees. Gamba is president and chief executive officer of Jordan Associates, one of the Southwest's largest and most respected advertising agencies.

Gamba's leadership has been marked already by an abundance of vision, energy and creativity – qualities certain to extend throughout her term.



In her position, Gamba is overseeing the expansion of programming activities, new efforts to reach out to a growing number of potential donors through strategic marketing programs, the continued commitment to excellence in financial management and accountability and the application of technology to the Foundation's operations and services.

Gamba also serves on the National Board of Directors of the American Automobile Association (AAA), is immediate past chairman of the Oklahoma Business Roundtable and was a member of the inaugural class of Leadership Oklahoma City. She also served as chairman of the board of the State Chamber of Oklahoma.

Serving with Gamba are James H. Holloman, Jr., vice president and William O. Johnstone, treasurer.

Web Site Continues To Add Information, Functionality

If you haven't visited the Oklahoma City Community Foundation's web site – www.occf.org — it would be a good time to become reacquainted. A new, more functional format and a broader range of information resources are now just a few clicks away.

Two new additions you might be interested in include sites for the Rural Oklahoma Community Foundation and the Lawton Community Foundation. Many financial advisors and donors also take advantage of free access to the Planned Giving Design Center (PGDC) for the latest news in charitable giving, estate planning and philanthropy. Check the PGDC link on the Community Foundation's home page.



Oklahoma City

**Community
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