

## Shaping the Future Through Charitable Giving

Since 1969, donors have been coming to the Oklahoma City Community Foundation to establish endowments for scholarships and charitable organizations they care about. We administer more than 100 scholarship and award endowments, all created by donors who wish to provide others a way to continue their education beyond high school. The endowments featured below highlight two great success stories and illustrate how donors' wishes can indeed shape future generations for years to come.

### A doctor's compassion continues to help others

As a practicing physician for 47 years, Ruth Mershon was a caring and dedicated doctor. Although she died in 2000, her compassion continues to influence future generations through an endowment fund that awards several annual scholarships.

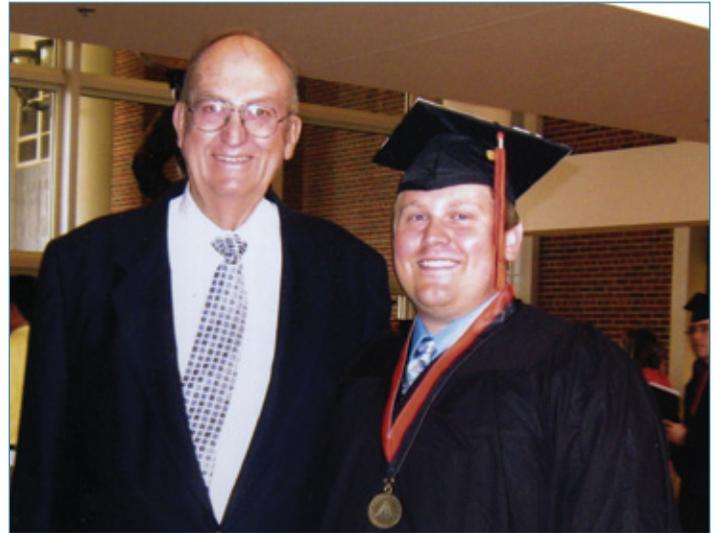
A 1949 graduate of the University of Oklahoma, Dr. Mershon was a respected anesthesiologist who first practiced in Hutchinson, Kan., before returning to Oklahoma City in 1975. She retired from her practice in 1996.

Dr. Mershon's grandfather was a professor and her mother was an avid reader, frequently visiting the public libraries in the communities in which she lived. Raised in a family that valued education, it came as no surprise that Dr. Mershon's estate plans included a bequest of the remaining assets of a retirement account to the Oklahoma City Community Foundation to create a fund in 2001 that would support scholarships for graduating high school students.



Danielle Thomas

Today, thanks to her generosity, the Ruth Mershon Scholarship is making a difference. One such student is Danielle Thomas, a 2006 recipient of the award from Del City High School. Danielle graduated from the University of Oklahoma Health Sciences Center in May 2010 with a bachelor's degree in health studies and plans to pursue a doctorate in physical therapy.



Charlie Hunt with his grandfather, Robert Hendrick, at Charlie's graduation ceremony at Oklahoma State University.

"This scholarship has greatly helped me financially through my first few years of college," says Danielle. "Now I am able to attend graduate school for physical therapy and receive the education I have always looked forward to."

The Oklahoma City Community Foundation can work with donors to facilitate a variety of giving options to establish a scholarship endowment fund. By designating a charitable gift such as retirement assets through estate plans, donors can fulfill their charitable goals without impacting their current assets and also ensure that their gift will continue on in perpetuity.

### Creating a family legacy

For Charlie Hunt, receiving the Hudiburg Family Fund Scholarship "meant everything."

"I knew that college was going to be a financial monster," he says. "Because of my major, I knew I wouldn't have time for a job, so the Hudiburg Scholarship was a huge help."

A 2005 graduate of Midwest City High School, Charlie received a bachelor's degree in athletic training from Oklahoma State University in 2009 and is currently

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# 15 Years Later: Fulfilling a mother's legacy

The Spencer family's roots in agriculture run deep. Sisters Rosslyn, Blayne and Chelsea grew up on their family's livestock operation in Chickasha where their parents, David Spencer and Dr. Margaret "Peggy" Clark, raised show horses and cattle. Both graduates of Oklahoma State University, David ran the family business while Dr. Clark served as a veterinary medical officer with the U.S. Department of Agriculture in Oklahoma City.

It was no surprise that the Spencer girls aspired to careers in the field of agriculture, knowing at an early age they wanted to follow in their parents' footsteps at Oklahoma State University. But when their mother was tragically killed in the 1995 bombing of the Alfred P. Murrah Federal Building, the future of the girls' educational dreams became a little more uncertain. Ages 16, 13 and 6 at the time of the bombing, the Spencer sisters didn't lose sight of their dreams. After graduating from Chickasha High School, all three girls were able to attend Oklahoma State University thanks to the Survivors' Education Fund administered by the Oklahoma City Community Foundation.

"We all have been extremely fortunate to have had the Survivors' Education Fund to support our college education," says Blayne. "The loss of a parent provides many hurdles for children and knowing that our education would be taken care of was a very important factor in helping us succeed."

## Survivors' Education Fund: 15-Year Update

The Oklahoma City Disaster Relief Fund was established following the 1995 bombing of the Alfred P. Murrah Federal Building. This fund holds all of the assets of the contributions received by the Oklahoma City Community Foundation to help survivors of that tragedy. The fund continues to assist a large number of individuals and families with medical support and mental health counseling.

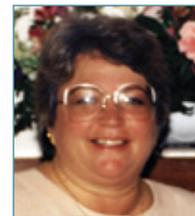
Included within the Disaster Relief Fund is the Survivors' Education Fund which provides scholarships for children who are eligible for assistance once they reach college age.

- Of the 213 students eligible to participate, 158 have attended one or more semesters of post-secondary education.
- A total of 87 have earned one or more degrees or certifications. This includes 22 master's degrees, one doctor of medicine degree, two doctors of veterinary medicine degrees, two pharmaceutical degrees and three jurist doctorate degrees.
- There are 24 children who have not yet reached age of eligibility (18).



Chelsea Spencer, Blayne Spencer-Arthur and Dr. Rosslyn Spencer-Biggs.

The three girls went on to graduate from Oklahoma State University, all with bachelor's degrees in Agricultural Economics. Rosslyn, the oldest daughter, obtained a doctorate in veterinary medicine and today serves in the very position her mother held at the time of her death, veterinary medical officer for the U.S. Department of Agriculture. Married to Scott Biggs, assistant district attorney in Caddo County, they live outside of Chickasha where they raise horses.



Dr. Margaret "Peggy" Clark

Blayne works for the Oklahoma Department of Agriculture, Food and Forestry as executive assistant and social media coordinator. She is married to Jerrod Arthur and has one son, Kelton. They live in Stillwater where they raise and sell show cattle for youth exhibitors throughout the United States.

The youngest sister, Chelsea, graduated from Oklahoma State University in May 2010 and remains very active in showing cattle. All three girls continue to participate in their family livestock operation, Spencer Livestock, LLC.

The Survivors' Education Fund is part of the Oklahoma City Disaster Relief Fund, which holds all of the assets of the contributions received to help survivors of the bombing of the Alfred P. Murrah Federal Building. Thanks to the generosity of thousands of donors coming together in a time of crisis, the Spencer girls were able to follow their educational dreams and carry on their mother's legacy.

# 2010 | Scholarship & Award Endowment Funds

## **Mike Allen Memorial Education Fund**

(1996) Established by the Oklahoma City Federation of Teachers in honor of a past president, the fund provides scholarships for Oklahoma City Public School graduates.

## **Aaron Alley Memorial Scholarship**

(2003) Established by classmates and friends in honor of Aaron who died of cancer at age 28. Award benefits a Woodward High School senior.

## **H.W. Almen/West OKC Rotary Scholarship**

(2004) Established through a bequest from the estate of a longtime member to encourage Oklahoma students to pursue education beyond high school at a vocational school, college or university.



H.W. Almen

## **American Society of Civil Engineers Scholarship**

(2000) Established to provide scholarships to engineering students at both the University of Oklahoma and Oklahoma State University.

## **American Society of Landscape Architects Scholarship**

(2006) Established by the Oklahoma Chapter, the fund supports a scholarship to a student attending an Oklahoma institution and pursuing a landscape design/landscape architect degree.

## **BSO Ivy Foundation Scholarship**

(2004) Established by the BSO Ivy Foundation, the fund supports scholarships awarded by the Beta Sigma Omega Chapter of Alpha Kappa Alpha Sorority.

## **John Barresi Memorial Scholarship**

(2009) Established by family, the fund supports an annual award to a student at Harding Charter Preparatory School.

## **J. Edward Barth Community Foundation Scholar Award**

(1998) Established by the Trustees of the Oklahoma City Community Foundation in appreciation of Ed Barth's nine years of service as a Trustee. The annual award goes to a Community Foundation Scholar at Casady School.



John Blaess

## **John Blaess Memorial Scholarship**

(2004) Established by friends and family, the fund supports an annual scholarship for a graduate of Edmond Memorial High School.

## **Patrick S. Bonds Memorial Scholarship**

(2000) Established by the family, the fund benefits students and teachers in the Midwest City-Del City Public Schools.

## **Vinita F. Boyer Scholarship**

(2007) Established by a bequest from Mrs. Boyer's estate, the scholarship benefits Oklahoma foster care children through the Oklahoma Youth with Promise Scholarship Program. An orphan herself who received a college scholarship, Mrs. Boyer wanted to make sure other students had the same opportunity.

## **Dr. Eugene S. Briggs Memorial Scholarship**

(1999) Provides scholarships through the Lions Clubs of Oklahoma and is named for a past president of Phillips University and a past International Director of Lions Clubs International.

## **Frank & Merle Buttram String Awards**

(1991) Established by Dorsey Buttram in memory of his parents to encourage teenagers in the appreciation of stringed instruments. The award is made through the Oklahoma Music Olympics.

## **Capitol Hill High School Award**

(2002) Established by John E. Orr through an initial challenge to his fellow alumni to enhance post-secondary educational opportunities for Capitol Hill High School graduates.

## **Carballo Family Foundation Scholarship**

(2003) Established by the Carballo family to encourage Hispanic students in higher education. An award is offered each year at Oklahoma State University and the University of Oklahoma.

## **Elizabeth E. Carlson Scholarship**

(2003) Established by a bequest from Miss Carlson's estate, the scholarship is awarded to Putnam City School District graduates who are pursuing a degree in education.



Elizabeth E. Carlson

## **Casady Class of 1996 Scholarship**

(2003) Established by members of the graduating class of 1996 to support the general scholarship program at Casady School.

## **Central High School Alumni Association Scholarship**

(1996) Established by Central High School alumni, scholarships are awarded through the Oklahoma City Community Foundation Scholars program, the Leveta Land scholarship in secretarial sciences, and vocational education scholarships for industrial arts.

### **Kimberly Kay Clark Memorial Scholarship Award – Naval Reserve Association**

(1995) Established in memory of an officer killed in the 1995 bombing of the Murrah Federal Building, the fund supports an award to recognize U.S. Naval Reserve members.

### **Classen Class of '54 Scholarship**

(2009) Established by the Classen High School class of 1954, the fund supports a scholarship to a graduate of Classen School of Advanced Studies.



### **Classen '55 Scholars Fund**

(1998) Established by the Classen High School class of 1955 and other donors, the fund provides scholarships to graduates of Classen School of Advanced Studies.

### **Classen Awards Foundation**

(1998) Originated by Anton H. Classen in 1926 and supported by previous award recipients, awards are given to outstanding graduates of the Classen School of Advanced Studies and Northwest Classen High School.

### **Classen Class of 1945 Scholarship**

(2006) Established by the Classen High School graduating class of 1945 to support scholarships for students of the Classen School of Advanced Studies.

### **Ralph Clinton Scholarship – Sales & Marketing Executives**

(1985) Established in honor of Mr. Clinton, a past president of the organization, the fund supports an annual scholarship for students pursuing a business or marketing degree.

### **Commander Family Scholarship**

(2004) Established by family in memory of A.C. Commander, the scholarship benefits an Oklahoma graduating high school senior who is seeking a higher education in Oklahoma.

### **Brad R. Corbett Memorial Academic Trust**

(2000) Established by family and friends, contributions support academic competition teams at Edmond Memorial High School.

### **Jean Hawley Curtis Scholarship**

(2004) Established by the Metropolitan Healthcare Association in memory of a longtime advocate of the group, the award encourages individuals working in the long-term care field to pursue nursing licensure.

### **Harley Custer Memorial Scholarship**

(1991) Established by friends and family in memory of an Oklahoma Livestock Marketing Association executive, a scholarship is awarded to a participant in the Oklahoma 4-H and FFA Junior Livestock Show.



Harley Custer

### **Dana Corporation Scholarship**

(1988) Established by the Dana Corporation to support scholarships for dependents of employees at its Oklahoma City manufacturing plant and other local students.

### **Dortha Dever Business Scholarship**

(2007) Established by Dortha Dever to support and encourage OCU students committed to a professional career in business. Award recipients are recommended by the Dean of the School of Business.

### **Douglass High School Class of 1967 Scholarship**

(2009) Established by members of the graduating class of 1967, the fund supports a scholarship to a graduating senior from Douglass High School.

### **Durant Community Scholarship**

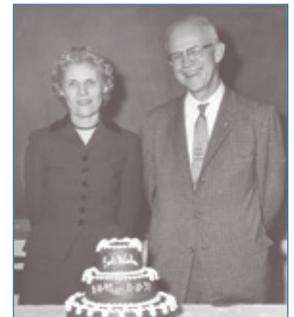
(2004) Established to encourage graduating seniors and recent graduates of Durant High School to continue their academic aspirations following high school.

### **Early Childhood Association of Oklahoma Scholarship**

(2002) Established by the Early Childhood Association of Oklahoma, the fund supports the Early Childhood scholarship program for childcare providers who want to further their education.

### **Everett Foundation Scholarships**

(1993) Since establishing the Everett Foundation fund in 1993, Dr. Mark A. Everett built a program of scholarships that promoted his motto—'having fun doing good.' Currently awarding more than 20 scholarships at six universities, the Everett Foundation fund supports scholarships in performing and visual arts and English. In addition, Dr. Everett established a scholarship in memory of his father, Dr. Mark R. Everett, a former dean of the University of Oklahoma Medical School, and another scholarship in honor of his mother, Alice A. Everett.



Dr. Mark R. & Alice A. Everett

### **Barbara Fagin Award Fund – Christmas Connection**

(1994) Established by the board of Christmas Connection in memory of the organization's founder, an annual award is made to a Capitol Hill High School senior and a Southeast High School senior.

### **Daniel and Jay Feiler Scholarship**

(2001) Established by Barbara Feiler in memory of her husband and a son, the fund benefits children attending the Erna Krouch Preschool at the Temple B'nai Israel.

### **Irene P. & Samuel F. Frierson Educational Trust**

(1997) Established by the trustees of the Frierson Educational Trust that was created through the couple's wills to provide scholarships for students to attend college in Oklahoma. Scholarships are awarded through the Oklahoma City Community Foundation's Trustee Scholarship Initiative.

### **Wauhilla Austin Gale Memorial Scholarship**

(2006) Established by family and friends in memory of a longtime art teacher at Purcell High School, a scholarship is awarded to a graduating senior of the school.

### **Edward King Gaylord Scholarship**

(1970) Established by Mr. Gaylord before his death and funded through a bequest in his will, this was the first scholarship endowment established at the Oklahoma City Community Foundation. Scholarships are awarded through the Trustee Scholarship Initiative.

### **Elsie Mae "Nat" Glosemeyer Scholarship**

(1998) Established by Mrs. Glosemeyer's friends and family, the scholarship benefits an at-risk graduate of a high school in eastern Oklahoma County.



Elsie Mae "Nat" Glosemeyer

### **Freda Poole Grayson Scholarship**

(1997) Established by Mrs. Grayson's family to support a scholarship for a graduate of Midwest City High School. Mrs. Grayson began her 29-year teaching career in Midwest City in 1953 at Epperly Heights Elementary.

### **Anita Hill Scholarship – Survivors' Education Fund**

(1999) Established by Ms. Hill following the 1995 bombing of the Murrah Federal Building to provide college assistance for those children who were in the Murrah Day Care Center.

### **Holistic Health Care Scholarship**

(2006) Established to increase the number of holistic health practitioners in Oklahoma. Awards support practitioners expanding their expertise or health care professionals seeking to incorporate holistic health/alternative medicine into their profession.



James H. Holloman Jr.

### **James H. Holloman Jr. Community Foundation Scholar Award**

(2006) Established by the Board of Trustees of the Oklahoma City Community Foundation in appreciation of Mr. Holloman's service as a Trustee, President and as a member of the scholarship committee. The annual award goes to a Community Foundation Scholar.

### **Geneva Hood Award – Casady School**

(1999) Established by Dr. and Mrs. J. William Hood in memory of his mother, a long time teacher. It is awarded annually to a faculty member at Casady School, selected by his or her peers, who best exemplifies the commitment and enthusiasm necessary to be an outstanding teacher.

### **Mary Beatrice House Scholarship**

(2009) Established to honor Mary Beatrice House and encourage black graduates of Douglass High School to pursue higher education.

### **G. Ed Hudgins Scholarships**

(1989) Established by a longtime Oklahoma City architect and co-founder of HTB, Inc., the annual scholarships are awarded to a fourth-year architectural design student and a fourth-year architectural engineering student at Oklahoma State University.

### **Hudiburg Family Fund Scholarship**

(2005) Fund supports scholarships to graduating seniors in the Mid-Del Public School System.

### **Hutchinson Scholarship**

(2010) Established by the Hutchinson family, the fund supports awards for employees and dependents at Hutch's C Store locations.

### **Iron Workers Local 584 & Signatory Contractors Scholarship**

(2002) Established by the Ironworkers Local 584 and Signatory Contractors for the benefit of members' children and grandchildren who continue their education after high school.

### **Vic Jackson Scholarship – Oklahoma Pilots Association**

(1998) Established by the association in memory of a pilot, the fund supports an annual scholarship awarded to a pilot training for a career in aviation, aviation education or airport management.

### **Virgil & Pauline Jackson Scholarship**

(1998) Established by Mrs. Jackson in memory of her late husband, Virgil, the scholarship is awarded to a full-time student majoring in education at Langston University.

### **Dennis James Scholarship – Deer Creek Baseball Fund**

(2007) Established by family and Deer Creek baseball supporters, the scholarship is in memory of the father of a former player. The scholarship benefits graduating seniors from Deer Creek High School who have participated in the baseball program for a minimum of two academic years.



Dennis James

### **Miles Jenkins Scholarship**

(2009) Established by friends and family in memory of a Deer Creek teacher, the fund supports a scholarship to a graduating senior of Deer Creek High School.

### **Kay Jewell Scholarship**

(2005) Established to honor the 2004 Putnam City High School Teacher of the Year, the scholarship is awarded to a graduate of the school.

### **William M. & Janet S. Johnson Scholarship**

(1987) Established through bequests from Mr. and Mrs. Johnson to provide opportunities for Minco High School graduates seeking a higher education. The fund also supports the Oklahoma City Community Foundation's Nursing Education Program operated in conjunction with five Oklahoma City-area hospitals.

### **Jones High School Scholarship**

(2000) Established by community volunteers to provide scholarships for graduates of Jones High School.

### **Friends of Kim Jones-Shelton Scholarship**

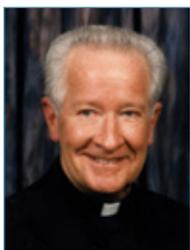
(1999) Established by friends and family, the scholarship is awarded to a black female student pursuing higher education.

### **Dorothy Detrick Kendall Piano Scholarship Award – University of Oklahoma School of Music**

(1995) Established by Mrs. Kendall's family in memory of Dorothy, who taught piano for more than 40 years, the award is made through the University of Oklahoma School of Music.

### **Dr. Edith King Mental Health Court Scholarship**

(2007) Established in honor of the contributions, leadership and commitment of Dr. King, the fund supports a scholarship awarded to a graduate student pursuing specialized education in mental health.



### **Rev. Kenneth King Memorial Scholarship**

(2007) Established by family to honor this retired Roman Catholic priest who dedicated his life to serving rural churches, the scholarship will be awarded to a Tulsa area senior graduating from a rural high school who will attend St. Gregory's University.

Rev. Kenneth King

### **Kirshner Trust Scholarship**

(1995) Established by a group of four private foundations located in Muskogee, the fund supports the Oklahoma Youth With Promise Scholarship Program.

### **Valerie Koelsch Memorial Scholarship**

(1995) Established by the Sheet Metal Workers International Association as a memorial for a local union member's daughter who was killed in the 1995 bombing of the Murrah Federal Building, the scholarship is awarded to a dependent of a local union member.

### **PFC Anthony Adam Landers "Zero To Hero" Scholarship**

(2003) Established in memory of PFC Anthony Adam Landers, the scholarship provides assistance for young adults who need academic tutoring to qualify for specific career training through Armed Services Vocational Battery.

### **Wann & Clara Langston Scholarship**

(1978) Established through a bequest in their estate, the fund supports a graduate nursing scholarship at University of Oklahoma Health Sciences Center. Dr. Langston was a longtime medical school faculty member.

### **Lawton Noon Lions Club Scholarship**

(2003) Established to provide a four-year, \$1,000 annual scholarship for a student attending Cameron University in Lawton.



### **Lawton-Oklahoma Arts Institute Scholarship**

(2003) Established by Dr. Gilbert Gibson and his wife Aulena to enable Lawton area students from any economic, social or cultural background to attend the Oklahoma Summer Arts Program at Quartz Mountain.

### **Charles Thomas "Tommy" Lewis Memorial Fund**

(2006) Established by Mr. Lewis' family, the scholarship supports training for health care professionals in the area of patient mobility.

### **Albert & Freda Marottek Scholarship**

(1998) Established by Mrs. Marottek in memory of her husband, the tuition assistance scholarship is awarded to families whose children attend St. James Catholic Church.

### **McGee Foundation Fund**

(2006) The McGee Foundation was established in 1963 by Dean A. and Dorothea McGee. Mr. McGee was one of the nine original Trustees of the Oklahoma City Community Foundation when it was established in 1969. In 2006, the McGee Foundation made a significant gift to support scholarships for foster children and students who will be the first in their family to attend college.

### **Frank McPherson Community Foundation Scholar Award**

(1998) Established by the Board of Trustees of the Oklahoma City Community Foundation in appreciation of Mr. McPherson's nine years of service on the Board of Trustees. The annual award goes to a Community Foundation Scholar.

### **Ruth Mershon Scholarship**

(2006) A 1949 graduate of the University of Oklahoma School of Medicine, Dr. Mershon practiced anesthesiology until her retirement in 1996. Through her estate, she established a fund that awards several annual scholarships.



Charles C. & Mary Lou Miles

### **Charles C. and Mary Lou Miles Scholarship**

(2007) Established by family members in honor of two former educators, the scholarship encourages black students in Oklahoma to pursue a post-high school education.

### **Dr. Gary M. Moore Dance & Arts Management Scholarship**

(1999) Established by an Oklahoma City psychiatrist for students at Oklahoma City University who are studying dance or arts management.

### **Dr. Gary M. Moore Great Plan Scholarship**

(2007) The scholarship is awarded to a student with financial need who is pursuing a degree at Oklahoma City University's School of Arts and Sciences.

### **Moore High School Alumni Association**

(2005) Established by the association, the fund supports the school's scholarship program.

### **Moore High School Alumni Association – George and Doral Hopper Scholarship Fund**

(2007) Established to provide scholarships for Moore High School graduating seniors who will pursue a post high school academic program, the award honors the achievements and contributions of George and Doral Hopper.

### **Moore High School Alumni Association – Bennie Raine Scholarship**

(2005) Established in honor of a longtime teacher, the scholarship is awarded to a graduate pursuing a degree in journalism or English.

### **Muskogee Public Schools Adult Day Camp Fund**

(2009) Established by the Kirshner Trust, the fund provides summer camp opportunities for individuals with disabilities who are over the age of 18.



Ronald J. Norick

### **Ronald J. Norick Community Foundation Scholar Award**

(2007) Established by the Board of Trustees of the Oklahoma City Community Foundation in appreciation of Mr. Norick's nine years of service as a Trustee. The annual award goes to a Community Foundation Scholar.

### **Northwest Classen High School Class of 1956 Scholarship**

(2007) Established by the Northwest Classen High School Class of 1956 to support a Community Foundation Scholar annual award at the school.

### **Paul B. Odom Jr. Community Foundation Scholar Award**

(2007) Established by the Board of Trustees of the Oklahoma City Community Foundation in appreciation of Mr. Odom's nine years of service as a Trustee. The annual award goes to a Community Foundation Scholar.

### **Oklahoma Engineering Foundation Scholarship**

(2000) Established to support engineering in Oklahoma, the scholarship is awarded to students enrolled in an undergraduate engineering curriculum at any Oklahoma university offering a four-year accredited engineering curriculum.

### **Oklahoma Goodwill Industries Abilities Scholarship**

(2007) Established to encourage individuals with disabilities to pursue their educational goals.

### **OKC Northwest Lions Club Scholarship**

(2005) Established by the civic club to support an annual award for an upper division business student attending Southern Nazarene University's College of Business.

### **Oklahoma Youth With Promise Scholarship**

(1996) Initiated by contributions from the Richard Coyle and Carolyn Berry families, the fund supports a program of scholarships to students who graduated high school while in foster care or other licensed placement.



### **Orner-Cook Scholarship**

(2007) Established by Robert and Carolyn Orner, in memory of Carolyn's mother, Gretchen Cook, and in recognition of the couple's love of traveling through international business. An annual award is made to a high school senior.

### **OSU – Agricultural Education Scholarship Inc.**

(2000) Established by the OSU-Agricultural Education Scholarship Foundation, the scholarship is awarded to students pursuing a degree in agricultural education.

### **Deborah R. & Wayne A. Parker Scholarship**

(1970) Established by Mr. Parker in memory of his wife, awards are made through the Oklahoma Youth with Promise and the Oklahoma City Community Foundation Scholars programs.

### Sen. Homer Paul Memorial Scholarship for Pauls Valley High School

(2006) Established by family, the fund supports a scholarship for a graduating senior of Pauls Valley High School who will attend either the University of Oklahoma or Oklahoma State University.

### Pi Beta Phi Alumnae Club Scholarship

(1990) Established by the Oklahoma City area alumnae club, the fund provides scholarships for Oklahoma City area students who are active Pi Beta Phi members at the University of Oklahoma or Oklahoma State University.

### Pilot Club Scholarship

(1985) Established by the Oklahoma City affiliate Pilot International, the fund supports the Trustee Scholarship Initiative.



Floy I. Pinkerton

### Floy I. Pinkerton Vocal Music Scholarship

(2004) Established by Smith & Kernke Funeral Home and the Kernke family to perpetuate Mrs. Pinkerton's love of music, the scholarship benefits a music student enrolled at Oklahoma City University.

### Larry W. Roach Leadership Award

(2002) Established as a tribute to a former senior vice president of the Benham Companies, the scholarship awards graduates of Midwest City High School and Carl Albert High School.

### Jeffrey Rogers Education Memorial Scholarship

(2006) Established in memory of a U.S. Marine killed in Iraq in 2005, the fund supports an annual award to a graduating senior of Putnam City North High School.



Jeffrey Rogers

### Will Rogers Air National Guard Scholarship

(1998) Supports an annual scholarship awarded by this National Guard retirees' association, also called the "Gray Eagles."

### Mary Baker Rumsey Volunteer Award — Junior League of Oklahoma City

(1992) Established by Joseph Rumsey in honor of his mother, the Junior League's first president, the fund supports an annual award to a sustaining member of the organization for lifetime service to the community.

### Seay A. Sanders Jr. Scholarship

(2006) Established in honor of a longtime principal of Townsend Elementary, the fund supports an annual award for a former Townsend Elementary student who is graduating from a Mid-Del high school.

### Mary & Spencer Sessions Teaching Award

(1989) Established in memory of the Sessions by their sons to recognize an outstanding teacher in the Guthrie Public Schools each year.

### Lorene Sherman Memorial Scholarship

(2001) Established by St. James Catholic Church as a way of honoring Lorene Sherman, the tuition assistance scholarship benefits students attending the church's school.

### Willie Elizabeth Shipley Scholarship

(1981) Established through a bequest in Miss Shipley's will, the fund supports the Oklahoma Youth With Promise Scholarship Program.

### Joe B. Smith Memorial Class of 1942 Scholarship Fund

(2008) Established through a bequest in Mr. Smith's will, the fund supports a scholarship to a graduating senior of his alma mater, Stratford High School.

### Robert V. Smith Memorial Scholarship

(1999) Established by family members, the scholarship is awarded to a graduate of Oklahoma Centennial High School.



Robert V. Smith

### Andersen-Spraberry Scholarships

(2006) Established by the Stella V. Andersen Trust to endow a scholarship program for Perry High School and Prague High School.

### Pete & Lela Stavros Scholarship

(2002) Established by the Stavros family and the Oklahoma State Firefighters Association (OSFA) to assist association members' family who attend college.

### Wendell Steward Scholarship

(2007) Established by the Southwest Homebuilders Association in memory of a lifetime director of the organization, the scholarship benefits a student attending Oklahoma City Community College and pursuing a construction-related degree or certification.

### Survivors' Education Fund

(1995) Established to assist with scholarships for higher education or vocational training for dependent children whose parents were killed or permanently disabled in the 1995 bombing of the Murrah Federal Building and the children in the federal building day care center who survived the blast. The Oklahoma City Community Foundation coordinates scholarship assistance for these students with other providers.

### Troop 193 Leadership Scholarship

(2003) Established to further the ideals of scouting and to reward those young men and women who excel in leadership. Applications are open to all graduating seniors at Casady School who remain active in Scouts and Campfire and have achieved the highest possible rank.

### **Brian Wechsler Memorial Scholarship**

(2009) Established by family, the fund provides a scholarship to a graduating senior of Edmond Memorial High School.

### **Michael J. Weiss Scholarship**

(2009) The fund provides scholarships to graduating seniors of Oklahoma City Public Schools, Carts & Parts employees and Emanuel Synagogue students.

### **Marie Welch Scholarship — O.A.I.A. Insurance Foundation**

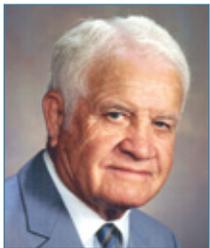
(1992) Established by the professional insurance agents of Oklahoma in honor of the first female president of the American Association of Managing General Agents, the fund provides scholarships for students who have chosen insurance as their major.

### **Western Oklahoma Building Trades Scholarship**

(1997) Established to support scholarships for dependents of union members and others interested in the future of union activities.

### **Westside Lions Club Scholarship**

(2002) Established by a bequest in Ms. Frances Koop Parsons' estate, the fund helps the club further its community service with special needs children at Buchanan Elementary School.



**Dean Wild**

### **Dean Wild Memorial Scholarship**

(2008) Established by family to benefit students attending high schools where Mr. Wild was a teacher, coach and administrator, the scholarship is awarded to students from either Putnam City West, Frederick, Hollis or Watonga high schools.

### **Deral E. Willis Scholarship**

(2000) Established by a bequest in Mr. Willis' estate, the fund benefits graduates of Sentinel, Oklahoma High School.

### **James M. Wilson Scholarship**

(2003) Established by Mr. Wilson's family, the fund provides scholarships to graduates of Boswell, Oklahoma High School.

### **Tracy Wilson Memorial Scholarship**

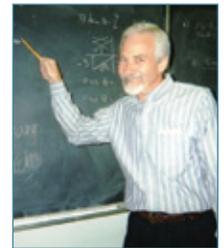
(1998) Established by Ken and Thala Wilson in memory of their son. Tuition assistance scholarships are awarded to students at St. James School where Tracy attended.

### **Mildred and William Young Scholarship**

(2007) Established by the Mahone Family Foundation to honor the lifetime achievements of Mildred and William Young, this scholarship encourages students from Hobart High School to pursue a post-high school education. Mildred, a lifelong caretaker for the Mahone family, and William, a longtime Hobart educator, were close friends of the Mahone family.

### **Dan Zanowiak Memorial Scholarship**

(2007) Established by family to honor a mathematics teacher, the scholarship benefits a senior at Edmond Santa Fe High School who has been enrolled in Edmond Public Schools for at least six semesters, and who wishes to pursue a career focused in quantitative analysis.



**Dan Zanowiak**

*Continued from Page 1*

pursuing a master's degree in kinesiology at Oklahoma City University, where he also works as an athletic trainer.

In deciding his future career path, Charlie's love of sports played a significant role. Having played varsity golf throughout high school, he knew he wanted to stay involved in some aspect of sports. "I love medicine and being around sports, so I figured why not do a combination of both," he says.

The Hudiburg Family Fund was established at the Oklahoma City Community Foundation in 2004 by David Hudiburg, president of the Hudiburg Auto Group of Midwest City. A graduate of Midwest City High School, David created the scholarship award on behalf of his family

to assist graduating seniors in the Mid-Del Public Schools.

The Hudiburg Auto Group was established in 1957 by David's father, Paul, who began selling used cars and tractors to area farmers in Prague. After graduating high school, David attended the University of Oklahoma and Southwest Texas State in San Marcos before returning to Oklahoma in 1989 to become general manager of the family business.

The Oklahoma City Community Foundation works with donors like the Hudiburg family to create endowments to meet their specific needs and ensure that their charitable giving is simple, flexible and forever. If you are interested in establishing a scholarship endowment fund, please contact Anna-Faye Rose at 405/606-2902 or Kenneth Conklin at 405/606-2926.

# Our Scholarship Program: The Basics

## What is an Endowment?

The scholarship and award funds listed on pages 3-9 are endowments which are permanent funds administered with the intent to preserve capital and enhance the value of the fund so it can support a charitable purpose such as scholarships. The idea of endowments has been around for centuries and one of the first endowments established at the Oklahoma City Community Foundation was a scholarship fund.

## How are Scholarship Endowments Invested?

All scholarship endowments are pooled with other Oklahoma City Community Foundation funds and invested by a team of professional investment managers. Our investment policy calls for a portfolio of stocks and bonds that is highly diversified and of high quality. Capital preservation and growth necessary to protect against inflation are the policy's fundamental objectives. Our Investment Committee monitors the performance of these managers and devotes significant time to consideration of issues of asset allocation and appropriate diversification.

The Investment Committee is comprised of Trustees and investment professionals in the community and is led by Investment Counsel, Hotchkiss Associates LLC of Chicago, Ill. This proven investment strategy has resulted in investment performance that has outperformed the market benchmark indices for the past 10 years compounded. Details of past investment performance results are available at [www.occf.org](http://www.occf.org).

## How Are Annual Distributions Determined?

Cash distributions from a scholarship and award endowment are based on a spending rule that calls for distributing 5 percent of the market value of the fund, averaged over the previous eight quarters. Any remaining investment return over the 5 percent is left in the fund to increase the fund value and to protect the future income stream against inflation.

Historical trends in the marketplace indicate that 5 percent is an appropriate amount to distribute while still maintaining the purchasing power of the fund. This is based on the assumption that total investment return for a balanced portfolio can reasonably be expected to average at least 8 percent and inflation over time will average 3 percent. A majority of large endowment funds for colleges and foundations use the 5 percent spending rule because the annual distribution from the fund is predictable and is not tied to current income, asset allocation or shifts in market conditions in any one year. This spending policy allows investment managers to focus on achieving the best total return for the portfolio that enhances the fund over time.

Cash distributions from endowments are made following the end of the fiscal year and the audit of the Oklahoma City Community Foundation. Scholarship payment plans coordinate with student enrollment schedules.

For more information on the investment and distribution policies of the Oklahoma City Community Foundation, please contact Carla Pickrell at 405/606-2901 or [c.pickrell@occf.org](mailto:c.pickrell@occf.org).

## Our Scholarship Program Staff

We are fortunate to have staff members dedicated to the scholarship program. Anna-Faye Rose serves as the scholarship administrator, a position she's held since 1995, and she has been instrumental in creating a well-respected program. Linda Keefe, a retired high school guidance counselor with more than 32 years of experience in secondary education, works with our Trustee Scholarship Initiative and the Central Oklahoma Guidance Network. As scholarship coordinator, Jane Rauh works with several scholarship programs including the Oklahoma Youth With Promise Scholarship Program.



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# Are You Interested in Establishing a Scholarship Fund?

The Oklahoma City Community Foundation administers more than 100 endowed scholarship funds in what is the state's largest independent scholarship program. We work with a variety of donors to either contribute to existing funds or create endowments that meet their goals.

If you are considering establishing a fully endowed scholarship fund that is uniquely named, we recommend you first review the Scholarship Directory at [www.occf.org](http://www.occf.org) to see if you can accomplish your charitable goals through an existing endowment.

The minimum for a fully endowed and uniquely named scholarship fund is \$40,000 and can be accumulated over time and come from more than one donor. Named funds to support scholarships awarded through existing Community Foundation programs may be endowed with a minimum of \$20,000. Our scholarship fund policy and agreement forms are available at [www.occf.org](http://www.occf.org).

## Below are four key questions to consider before you establish a fully endowed scholarship fund:

1. What is the purpose of the scholarship fund?

*Examples:*

Encourage students  
Promote a professional field  
Memorialize or honor a loved one

2. What criteria will be used in selecting the recipient?

*Examples:*

Academic merit  
Financial need  
Community service  
Contest or award winner

3. What value will the award have and is it a one-time award or an award a student can re-apply for in subsequent years? Please note the minimum award amount is \$1,000

4. What role or roles will you have?

*Examples:*

Donor only  
Selection Committee member  
Participate in public presentation of award to recipient

## IRS Requirements

The Oklahoma City Community Foundation must ensure that the scholarship criteria and administrative processes for all scholarship funds are in compliance with regulations of the Internal Revenue Service regarding charitable funds. As a result, our Trustees:

- must assure that the promotion and selection process is fair, equitable and non-discriminatory.
- must have final approval regarding all scholarship recipient selections.
- must assure expenditure control over all disbursements (all disbursements are transmitted to the scholarship recipient's educational institution).



For more information on establishing an endowed scholarship fund, please contact Kenneth Conklin at 405/606-2926 or [k.conklin@occf.org](mailto:k.conklin@occf.org).

## Family establishes endowment to ensure award will continue for generations

The Wechsler family had administered a scholarship in memory of their son Brian for a number of years before deciding in 2009 to establish a permanent endowment for the award at the Oklahoma City Community Foundation. The Brian Wechsler Memorial Scholarship benefits a graduating senior at Edmond Memorial High School.



**Brian Wechsler**

"First and foremost, we felt like we could turn the fund over to an organization that would take care of it with the utmost integrity and trust," explains Marsha Wechsler, Brian's mother. "Also our faithful contributors that continue to donate to Brian's scholarship fund would get to do so now for a charitable tax-deduction. Probably the main reason is, if anything ever happens to us, Brian's scholarship will continue to help students for years to come. That was our dream from the beginning."



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## Charitable Giving: 24/7 at [www.occf.org](http://www.occf.org)

Thanks to our secure online giving service, you can make a gift to any endowment fund – including the scholarship funds listed in this publication – using a major credit card at any time from any place.

We are able to offer this convenience through a partnership with AuctionPay, a well-respected national online giving service provider. Once you complete your online transaction using either a VISA, MasterCard or American Express credit card, you will receive an immediate e-mail confirmation of the gift that also serves as your record for tax purposes. Within a few business days, we will receive your contribution. It's that easy!

There are several options to making an online gift:

1. You can go directly to [www.occf.org/onlinegiving](http://www.occf.org/onlinegiving) and follow the easy instructions listed on the page.
2. Go to [www.occf.org/scholarshipdirectory](http://www.occf.org/scholarshipdirectory) and find the specific scholarship endowment you'd like to make a gift to, click on the Donate Now button and complete the online form.

**DONATE NOW**

Simplify your charitable support through our secure online giving service! If you have further questions, please contact Jennifer Stewart at 405/606-2912.

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