



OKLAHOMA CITY COMMUNITY FOUNDATION

Helping you help the community



2011 DONOR
REPORT



Donor Report 2011:

An overview of the most recent fiscal year of the Oklahoma City Community Foundation.

Table of Contents

- Fiscal Year 2011 Investment Performance Report – Pages 2-4
- Fiscal Year 2011 Charitable Organization Endowment Funds Values and Distributions – Pages 5-8
- Fiscal Year 2011 Scholarship and Award Endowment Funds Values – page 9
- Options for Giving Now and Later – pages 10-11
- Fiscal Year 2011 Snapshot – page 12
- Staff Contact Information – Inside Back Cover

Board of Trustees

Stephen Mason, President

Mary Ann Bauman M.D.	Jane Jayroe	Christian K. Keesee
James C. Clark	Ann Johnstone**	Ex-Officio
Nancy Coats-Ashley	Judy Love*	
James Daniel*	Harry Merson	
Steven C. Davis	J. Larry Nichols	
Kirkland Hall	P.B. Odom III**	
Leslie Hudson	Bond Payne	
Oscar Jackson	Tony Tyler	

*term ended June 30, 2011 **term started July 1, 2011

Our Mission Statement

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

Our Vision

The Oklahoma City Community Foundation values integrity, stewardship and collaboration. We strive to be enlightened leaders with a long-term perspective of community issues and opportunities, and we encourage and assist donors' philanthropy for the benefit of the community.

The Oklahoma City Community Foundation Staff

Administration

Nancy B. Anthony, Executive Director
405/606-2900
n.anthony@occf.org

Rhonda Godwin, Director of Administration
405/606-2916
r.godwin@occf.org

Sarah Pool, Office Manager
405/606-2905
s.pool@occf.org

Louie Jameison, Gift Acknowledgement
405/606-2904
l.jameison@occf.org

Barbie Luttrell, Receptionist
405/606-2947
b.luttrell@occf.org

Financial Services/Accounting

Cathy Lippard, Controller
405/606-2915
c.lippard@occf.org

Diane Baker, Assistant Controller
405/606-2921
d.baker@occf.org

Chris Busby, Accountant
405/606-2903
c.busby@occf.org

Cara Fraley, Accountant
405/606-2924
c.fraley@occf.org

Sharon Ammons, Special Projects Accountant
405/235-5603
s.ammons@occf.org

James Bonds, Administrative Accountant
405/606-2906
j.bonds@occf.org

Donna Harless, Accounting Support
405/606-2925
d.harless@occf.org

Development and Donor Services

Kenneth Conklin, Director
405/606-2926
k.conklin@occf.org

Jennifer Stewart, Donor Services
405/606-2912
j.stewart@occf.org

Tracy Treps, Donor Services
405/606-2920
t.treps@occf.org

Planned Giving Services

Joe Carter, Director
405/606-2914
j.carter@occf.org

Community Programs

Gayle Farley, Program Officer
405/606-2910
g.farley@occf.org

Brian Dougherty, Margaret Annis Boys Trust
Program Officer
405/606-2908
b.dougherty@occf.org

Mary Surbeck, Literacy Program Officer
405/606-2917
m.surbeck@occf.org

Adrienne Elder, iFund Program Officer
405/606-2930
a.elder@occf.org

Anna-Faye Rose, Scholarships Administrator
405/606-2902
a.rose@occf.org

Linda Keefe, Central Oklahoma Guidance
Counselor Network
405/606-2909
l.keefe@occf.org

Wanda Minter, Scholarship Program
405/606-2907
w.minter@occf.org

Kirkpatrick Family Fund

Liz Eickman, Director
405/767-3702
l.eickman@occf.org

Tina Burdett, Grants and Programs
Administrator
405/767-3702
t.burdett@occf.org

Adrian Owen, Grants and Programs Associate
405/767-3702
a.owens@occf.org

Communications

Cathy Nestlen, Director
405/606-2913
c.nestlen@occf.org

Neil Cambre, Graphic Designer & Web Manager
405/606-2923
n.cambre@occf.org

Jana Steelman, Communications Manager
405/606-2922
j.steelman@occf.org

Information Technology

Mike Murphy, Director
405/606-2911
m.murphy@occf.org

Facility Maintenance

Bill Schmid
405/606-2931
b.schmid@occf.org

Maintaining a Disciplined Approach to Investment Management

Since our founding in 1969, the Oklahoma City Community Foundation has been the metropolitan area's leading advocate for building endowment funds through not only support from donors but also through a sound investment strategy. Our investment policy benefits all endowments, large and small, because we balance the use of active managers and index funds in a way that maximizes the opportunity for adding value while keeping the cost low. As a result, we have produced annualized returns over 10 years that exceed the markets but at a cost much lower than mutual funds or other balanced fund alternatives.

Investment Policy

Our investment policy is specifically designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity. The goals of our policy are to allow the fund to generate distributions, grow to accommodate inflation and continue to exist in the future. Because of these goals, our investment policy has four major objectives:

- Capital preservation
- Inflation protection
- Continuing source of annual distribution for charitable purposes
- Investment return in the top third of professionally managed funds

As endowment fund investors we have a perpetual horizon and maintain a disciplined approach to long-term investment strategy while utilizing short-term tactical allocations to add value when there is opportunity. We also remain committed to a long-term diversification strategy with an allocation to high quality fixed income assets even in times of booming equity investments. In addition, our prudent distribution policy, summarized below, provides a structured method of making distributions from an endowment that protects the stream from inflation thus creating a predictable annual distribution and allows the Investment Committee to focus on maximizing total investment return.

FY2011 Financial Highlights

General Pool Total Return	21.57 percent
10-Year Performance	5.42 percent
Gifts	\$17 million
Grants	\$19.5 million

While the volatility of the markets in recent years has been challenging, our Investment Committee has remained disciplined in staying with a policy that emphasizes diversification of assets, quality investments and a long-term perspective. Both the committee and our Trustees view these responsibilities as among the most important that we provide as managers of the community's endowment.

Distribution Policy

Since 1989, we have employed a distribution policy that permits endowments to capitalize on good investment years as well as protect them in low or negative return markets. Cash distributions from most of the endowment funds we administer are based upon a spending policy that calls for distributing 5 percent of the fund's average market value. The remaining investment return is left in the fund to increase the value. The annual distribution amount is based upon a rolling quarter average of the fund's market value. Effective FY2011 we increased the number of quarters from eight to 12 thus further protecting the distribution from market fluctuations. Thanks to the policy, this fall we will distribute \$5.3 million back to the more than 300 organizations who participate in the Charitable Organization Endowment Program. Visit www.occf.org for more information on our investment and distribution policies.

Investment Performance Pooled Investments as of June 30, 2011

	Year Ended June 30, 2011	Three Years Ended June 30, 2011	Five Years Ended June 30, 2011	10 Years Ended June 30, 2011
Equities				
Oklahoma City Community Foundation	32.36%	3.98%	3.79%	4.32%
S&P 500	30.68%	3.33%	2.94%	2.72%
Fixed Income				
Oklahoma City Community Foundation	4.08%	5.78%	6.21%	5.60%
Barclay's Capital G/C Int.	3.77%	5.75%	6.08%	5.34%
Total Return				
Oklahoma City Community Foundation	21.57%	5.45%	5.23%	5.42%
65% S&P 500/35% Barclay's Capital G/C Int.	21.26%	4.90%	4.62%	4.07%

A Sound Investment Process Provides Solid Returns

Achieving good investment results is a top goal of the Oklahoma City Community Foundation Trustees and its Investment Committee. While the markets can be volatile, we have both a strong process for allocation and review as well as a committee that is well informed and actively involved. We are very open about the process and the results, and are confident in our approach that has produced a solid investment product for many years. For FY2011, the return on our pooled investments was 21.57 percent. This marks the best fiscal year return in the 18-year history of the Oklahoma City Community Foundation's pooled investment program.

Investment Committee

Our Investment Committee is comprised of four Trustees or past Trustees and three community leaders who are knowledgeable about investments. It is the role of the committee to oversee the investment functions through adopting the investment policy, hiring the primary professional investment consultant and each of the investment managers. At its quarterly meetings, the committee reviews the investment performance and the recommendations for the allocation of assets to equities or fixed income and then to the various style sectors. This committee provides one of the most important functions that we offer to donors and nonprofit endowments.

Since 1998, Hotchkiss Associates has served as our investment consulting firm. Based in Chicago, Hotchkiss Associates is affiliated with United Capital Financial Advisors, which provides administrative and research support to the firm. In addition to monitoring investment performance and making recommendations about asset allocation, the firm assists with the selection of style-specific managers to implement the Investment Committee's allocation policy.

The Process

Our management process begins with the Investment Committee's determination of percentages of the assets to be allocated between equities, fixed income securities and cash. Next, the committee determines the equity allocation among the various styles of equity management. As of June 30, 2011, the asset allocation is 62.5 percent in equities, 37.5 percent in fixed income securities and 0 percent in money market cash funds. Once allocation is determined, the committee selects the style-specific equity managers.

We currently use eight active managers, six for equities and two for fixed income investments. In addition to these managers who actively select stocks in each of their respective sectors, we also use a group of index funds which provides additional diversification within each sector. The return from the index funds is targeted to match the market, and the relatively low cost of these index funds assists us in maintaining a very low total cost for our investment operations. The primary provider of these index funds has been BlackRock (New York) and the annual costs range from 5 basis points to 35 basis points.

Endowment funds benefit from low cost, efficient investment management

The low cost and efficient operation of our investment program benefits all endowments, large and small. We accomplish this by balancing the use of active managers and index funds in a way that maximizes the opportunity for adding value but keeps the cost low. As a result, we have been able to produce annualized returns over 10 years that exceed the markets but at a cost which is much lower than mutual funds or other balanced fund alternatives.

Due to the size of our investment pool, this level of equity exposure is available so that even the smallest funds benefit. Utilizing a large investment pool that allows us to keep fees low is another benefit the Oklahoma City Community Foundation provides to the endowments it administers. For FY2011 the cost of investments at the Oklahoma City Community Foundation was 33 basis points, compared to more than 100 basis points for the average mutual fund or active equity fund manager.

Investment Committee 2010-11



Steven C. Davis, CHAIRMAN
TRUSTEE,
OKLAHOMA CITY
COMMUNITY FOUNDATION
*Attorney, Hartzog
Conger Cason & Neville*



Stephen Mason
PRESIDENT,
OKLAHOMA CITY
COMMUNITY FOUNDATION
EX-OFFICIO
Cardinal Engineering

Paul W. Dudman
TRUSTEE,
OKLAHOMA CITY
COMMUNITY FOUNDATION
*Attorney, Fellers Snider
Blankenship Baily & Tippens*

Kirkland Hall
TRUSTEE,
OKLAHOMA CITY
COMMUNITY FOUNDATION
Fred Jones Industries

James H. Holloman Jr.
PAST PRESIDENT,
OKLAHOMA CITY
COMMUNITY FOUNDATION
Attorney, Crowe & Dunlevy

Peter B. Delaney
Chairman & CEO,
OGE Energy Corp.

Scott Mueller
Hall Capital Partners

Gary Pierson
CHIEF OPERATING OFFICER
The Oklahoma Publishing Company

J. Edward Barth
PAST PRESIDENT,
OKLAHOMA CITY
COMMUNITY FOUNDATION
EX-OFFICIO
Attorney, Andrews Davis

Christian K. Keesee
PAST TRUSTEE,
OKLAHOMA CITY
COMMUNITY FOUNDATION
EX-OFFICIO
Chairman, Kirkpatrick Bank

Investment Counsel

Hotchkiss Associates, LLC
303 W. Madison, Suite 1050, Chicago, Ill. 60606

Pooled Investments Performance Summary for FY2011

Manager	% of Total Portfolio		Rate of Return
	June 30, 2011	June 30, 2011	Year Ended June 30, 2011
EQUITY			
LARGE CAP VALUE			
Wedge Capital Management	6.66%	10.76%	21.72%
BlackRock Russell 1000 Value Index Fund	6.57%	10.60%	29.04%
Russell 1000 Value			28.94%
LARGE CAP GROWTH			
BlackRock Russell 1000 Growth Index Fund	16.23%	26.20%	35.02%
Russell 1000 Growth			35.01%
SMALL/MID CAP VALUE			
Earnest Partners	3.89%	6.28%	35.20%
Russell 2000 Value			31.35%
SMALL/MID CAP GROWTH			
Columbus Circle Investors	4.78%	7.72%	44.74%
Russell 2500 Growth			44.71%
INTERNATIONAL			
BlackRock EAFE Index Fund	4.60%	7.43%	30.41%
MSCI EAFE (US\$) Net			30.36%
BlackRock Emerging Markets Index Fund	0.56%	0.90%	27.64%
Aberdeen Emerging Markets Fund	4.49%	7.25%	31.14%
MSCI EMF (Gross) Index			28.17%
CORE			
BlackRock Russell 1000 Index Fund	9.69%	15.64%	31.51%
Russell 1000			31.93%
Kalmar Investments	2.51%	4.06%	49.53%
BlackRock Russell 2000 Index Fund	0.01%	0.02%	37.62%
Russell 2000			37.41%
HIGH YIELD BONDS			
Wells Fargo High Yield Bd Fd	1.95%	3.15%	12.60%
CSFB High Yield Bond Index			14.17%
TOTAL EQUITIES	61.95%	100.00%	32.36%
S&P500 Stock Index			30.68%
FIXED INCOME			
JPMorgan	19.08%	51.33%	3.96%
Bank of Oklahoma	17.13%	46.10%	4.38%
BlackRock 1-3yr. Treasury Bond Index Fund	0.96%	2.57%	1.29%
TOTAL FIXED INCOME	37.17%	100.00%	4.08%
Barclays Capital G/C Int. Index			3.77%
Barclays Capital 1-3 Govt			1.38%
CASH			
JPMorgan Money Market Fund	0.88%	100.00%	0.7%
TOTAL POOLED INVESTMENTS	100.00%		21.57%
Composite Indices			
65% S&P500/35% Barclays Capital G/C Int.			21.26%

Notes: Investment managers are measured against the index selected for that manager's specific style with the overall performance of the equities being measured against the S&P500 stock index. All performance returns are gross of management fees and custody/transaction charges and net of sales commissions.

Year Ended	General Pool Rate of Return	Composite Indices (Note A)
June 30, 2011	21.57%	21.26%
June 30, 2010	12.99%	12.28%
June 30, 2009	-14.61%	-15.20%
June 30, 2008	-3.23%	-5.94%
June 30, 2007	13.68%	15.40%
June 30, 2006	6.82%	5.54%
June 30, 2005	7.52%	5.76%
June 30, 2004	15.03%	12.39%
June 30, 2003	5.28%	3.96%
June 30, 2002	-5.58%	-8.83%
Ten Years Compounded (Note A)	5.42%	4.07%

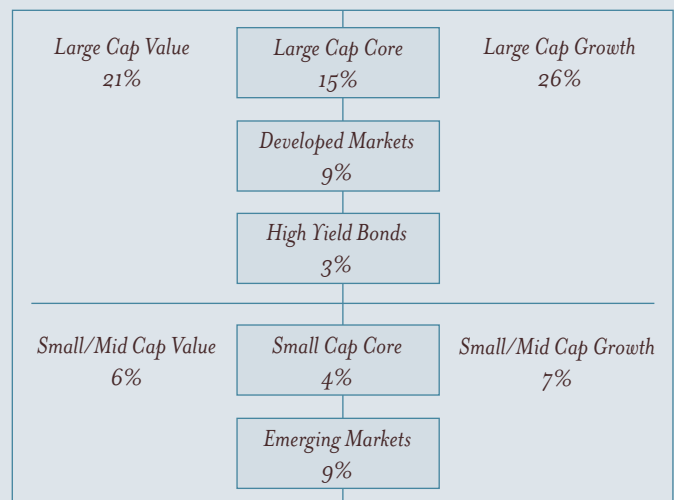
Note A: Equity performance is compared to the Standard and Poor's 500 stock index (S&P500); fixed income performance is compared to the Barclays Capital Government/Credit Intermediate bond index (Barclays G/C Int.); and total return is compared to the composite of these indices with weighting based upon applicable asset allocation.

As of 6/30/11

Asset Allocation Model - General Pool

	Target	Range
Equity	62.5%	40-70%
Fixed Income	37.5%	30-60%
Cash	0%	0-10%

Asset Class Target Percentage Allocation for Equities



Target Asset Class Ranges

Large Cap Value	18-28%	Small/Mid Cap Value	4-10%
Large Cap Growth	18-28%	Small/Mid Cap Growth	4-10%
Large Cap Core	20-48%	Small Cap Core	10-24%
Developed Markets	5-15%	Emerging Markets	5-10%
High Yield Bonds	0-7%		

Charitable Organization Endowment Funds

As of August 1, 2011

The Charitable Organization Endowment Program includes more than 300 nonprofit organizations. The organizations are listed below categorically according to their field of service or type of programming. A number of the organizations have more than one endowment and those additional "sub funds" are also listed. The second column is the endowment's fund value as of June 30, 2011 while the third column gives the FY2011 distribution amount. In most cases, the distribution amount is based upon 5 percent of the average market value of the endowment over the previous 12 quarters. The organizations that have Affiliated Funds may have different distribution policies based upon the policies that govern that fund.

	Market Value as of 6-30-2011	FY 2011 Distribution		Market Value as of 6-30-2011	FY 2011 Distribution
Arts & Culture			Community Development Organizations		
Allied Arts Foundation	\$ 1,125,181	\$ 51,733	Association of Fundraising Professionals	\$ 23,645	\$ 1,058
Ambassadors' Concert Choir	132,242	6,031	Cimarron Alliance Foundation	19,814	896
American Choral Directors Association	42,641	1,086	Crime Stoppers of Oklahoma City	85,264	3,884
Arts Council of Oklahoma City	374,676	16,817	Executive Service Corps of Central Oklahoma	37,189	1,433
Canterbury Choral Society	190,556	8,746	Executive Women International	136,315	6,255
Chamber Music in Oklahoma	176,442	7,884	Impact Oklahoma	34,244	1,389
- Berrien Kinnard Upshaw Fund	50,075	2,301	Jewish Federation of Greater Oklahoma City	259,964	11,752
Cimarron Opera Company	142,391	6,246	- Ralph Dorn Fund	219,564	10,087
City Arts Center	1,626,343	74,193	Junior Hospitality Club	182,448	8,385
Fine Arts Institute of Edmond	149,087	6,562	Junior League of Oklahoma City	243,044	11,170
Guy Fraser Harrison Academy for the Performing Arts	76,272	3,312	Kiwanis Club Special Activities	73,192	3,218
Individual Artists of Oklahoma/ Linda Jaeger Memorial	46,075	2,100	L'Alliance Francaise d'Oklahoma	123,220	5,747
International Photography Hall of Fame & Museum	425,761	19,427	Leadership Oklahoma City	1,022,737	49,000
Jacobson Foundation	66,685	3,048	League of Women Voters of Oklahoma	46,328	2,105
Jazz in June	43,676	1,317	Midwest City Rotary Foundation	19,695	906
Ladies Music Club of Oklahoma City	63,307	2,526	National Society of Colonial Dames of America in Oklahoma	193,956	8,912
Lawton Philharmonic Society	94,699	4,353	Navy League for USS Oklahoma City and E6-A Squadron	120,480	5,535
Lyric Theatre of Oklahoma	1,349,504	60,437	The Ninety-Nines Association of Women Pilots and Museum	113,229	5,054
- Curt Schwartz Scholarship	89,795	4,114	Oklahoma Center for Nonprofits	132,015	6,065
Melton Art Reference Library	52,787	2,426	Oklahoma City All Sports Scholarship Relief Fund	46,345	2,132
- Melton Scholarship Fund	48,489	2,228	Oklahoma City Boathouse Foundation	63,445	2,627
Jasmine Moran Children's Museum	106,027	4,814	Oklahoma City Foundation for Architecture	142,328	6,496
National Cowboy & Western Heritage Museum	1,397,946	60,000	Oklahoma County Bar Foundation	302,398	13,070
National Cowboy & Western Heritage Museum - Docent Council	28,440	1,194	Oklahoma Lions Service Foundation	162,589	7,462
OK Chorale	38,238	1,544	Redbud Foundation	48,108	2,019
Oklahoma Arts Institute	241,522	11,045	Rotary Club 29 Foundation	226,234	10,315
Oklahoma Children's Theatre	97,863	4,245	Jim Thorpe Association	22,758	1,103
Oklahoma City Ballet	192,899	8,854	Women of the South	20,192	941
Oklahoma City Museum of Art	3,924,404	181,775	Education: Community Organizations		
- Fee-Milligan Endowment	1,825,916	87,479	Friends of Libraries in Oklahoma	40,458	1,285
- Carolyn A. Hill Collections Fund	624,272	-	Friends of the Metropolitan Library System	126,722	5,642
- James C. & Virginia W. Meade Collections Fund	1,145,754	-	Friends of the Mustang Public Library	44,371	1,801
- Robert & Harriet Orbach Fund	97,156	4,654	Friends of the Norman Public Library	52,416	2,407
Oklahoma City Orchestra League	379,641	17,251	Institute of International Education	207,295	9,527
Oklahoma Community Theatre Association	20,079	903	- Alice Pratt Internship Fund	162,903	7,487
- Lil Williams Festival	26,147	1,111	- Colin and Brooke Lee Fund	83,616	3,843
Oklahoma Museums Association	91,886	4,139	Library Endowment Trust	333,983	12,498
Oklahoma Philharmonic Society	1,648,224	77,679	Oklahoma City Literacy Council	32,095	1,394
- J. Landis Fleming Fund	6,701	321	Oklahoma Humanities Council	153,203	7,040
- Fund for Collaborative Performances	3,178,394	92,000	Oklahomans for Special Library Services	360,458	16,436
Oklahoma Shakespeare in the Park	71,515	3,206	Payne Education Center	140,184	6,438
Oklahoma Visual Arts Coalition	82,498	3,529	Weatherford Public Library Foundation**	22,610	833
Paseo Artists Association	70,844	3,192	Education: Preschool - 12th Grade		
Photographic Society of America**	50,157	1,409	Calumet School Foundation	33,178	1,393
Prairie Dance Theatre	104,645	4,775	Casady School	795,646	26,253
Red Earth	179,524	8,250	- Carolyn Young Hodnett Scholarship	200,009	9,142
- Kathleen Upshaw Fund	16,627	764	- Eleanor Kirkpatrick Fine Arts Chair	1,680,881	65,618
Science Museum Oklahoma	58,587,459	1,655,737	- John E. Kirkpatrick Fund	955,640	43,667

	Market Value as of 6-30-2011	FY 2011 Distribution		Market Value as of 6-30-2011	FY 2011 Distribution
- Jane B. McMillin Memorial	\$ 58,932	\$ 2,614	OSU Agricultural Education Scholarship Inc.	\$ 515,138	\$ 20,285
- Records Family Scholarship	514,625	23,523	Will Rogers Air National Guard Scholarship	48,616	2,155
- Scholarships	385,000	8,575	A. Kurt Weiss Lectureship	85,045	2,440
Celebrations Preschool	146,621	6,488	Marie Welch Independent Insurance		
Christ the King Catholic School	65,610	2,871	Agents of Oklahoma Scholarship	72,788	3,346
- James C. & Virginia W. Meade Fund	61,758	2,830	Education: College, Universities & Vocational Schools		
Christian Heritage Academy	101,039	1,421	Hillel Foundation/University of Oklahoma	453,223	20,196
Crescent Public Schools Foundation.	26,145	1,202	- Louis Berlowitz Lodge	10,807	496
Deer Creek Public Schools	1,678,836	70,440	- Milton J. Gordon Memorial	200,650	9,303
Edmond Public Schools Foundation	314,857	13,526	- John Horwitz Memorial Library	19,391	891
- Eloise Rodkey Rees Inspirational Essay Award	20,825	943	Langston University	827,002	36,194
- Rees Fund	30,003	1,360	- Rachel Starks Durham Scholarship	16,557	749
El Reno Public School Foundation/ Wilbur and Jean Gardner Scholarship	105,209	4,813	- Helen Aline Johnson Scholarship	18,766	853
The Foundation for Oklahoma City Public Schools	209,327	9,566	- Kirkpatrick Scholarship	62,504	2,800
Guthrie Educational Foundation	42,624	1,087	- Al Bert Prewitt Sr. & Audrey Monroe Prewitt Endowment	17,263	784
Heritage Hall	841,591	36,000	- Baxter L. Tilford Scholarship	28,865	1,293
- Landscaping Fund	72,365	3,000	Oklahoma Baptist University	164,092	7,393
- Reynolds Endowment	21,638	-	- Business Program	127,274	5,845
- Teacher Endowment	777,189	50,000	- Hobbs Lectureship	211,342	9,707
Erna Krouch Preschool	74,453	3,292	- James Hurley Professorship	64,960	2,984
Markoma Christian Ministries	950,864	43,451	- Scholarships	85,369	3,914
Bishop McGuinness Catholic High School	185,967	8,378	Oklahoma Christian University	1,204,174	54,148
Midwest City-Del City Public Schools Foundation	352,389	16,056	- Olen V. Hurst Scholarship Fund	20,715	.*
Millwood School District Enrichment Foundation	27,832	1,272	- McBride Center for Faith & Literature	198,118	4,057
Moore Public Schools Foundation for Academic Excellence	133,374	6,123	Oklahoma City Community College	190,841	8,760
Mount St. Mary Catholic High School	461,905	19,675	Oklahoma City University	2,228,287	101,645
- Tom Swyden Fund	15,526	714	- Benham Professorship	162,601	7,437
Oklahoma Christian School	47,413	1,495	- Film Institute	31,853	1,381
Oklahoma FFA Foundation	1,349,678	51,564	- Fine Arts Department	98,351	4,499
Oklahoma Foundation for the Education of Blind Children & Youth	42,086	1,939	- Richard Kells Memorial Scholarship	55,779	2,090
Oklahoma Foundation for Excellence	154,579	7,096	- Law School Dean's Fund	203,647	9,327
Oklahoma School of Science and Mathematics	310,831	13,399	- Law School Seminar Fund	459,538	17,636
Positive Tomorrows	399,389	18,154	- Petree School of Music Fund	114,825	5,252
Putnam City Public Schools Foundation	461,011	21,068	- Societies Fund	84,907	3,883
Rosary Catholic School	107,543	4,861	Oklahoma State University/School of Civil & Environmental Engineering	156,433	6,731
Sacred Heart Catholic School	340,498	14,642	Oklahoma State University		
St. Charles Borromeo Catholic School	72,619	3,189	- Oklahoma City	142,647	6,032
St. James Catholic School	234,101	10,611	- Horticulture Center	247,487	10,931
St. John Christian Heritage Academy			- Rumsey Garden	125,104	5,291
- Waltine Lynette Jackson Endowment	135,633	6,233	- Diane Miller Greenhouse Scholarship	29,479	1,058
St. John's Episcopal School	164,344	7,485	Opportunities Industrialization Center	253,929	11,632
- Calvin and Peola Battle Scholarship	9,265	426	Redlands Community College	55,164	2,468
- Edward Wade Dalton Memorial	13,742	632	- Burress Family Scholarship	77,616	3,391
- Sherry Rowan Scholarship	5,890	271	- El Reno Chamber of Commerce – Masonic Lodge #50/RCC Aggie Club Scholarship	41,054	1,213
St. Mary's Episcopal School of Edmond	158,187	5,035	- Howard and Rebecca Rainey Hutson Scholarship	38,368	1,761
St. Elizabeth Ann Seton Catholic School	58,761	2,699	- Tyler Knecht Memorial Endowed Scholarship	23,521	771
Special Care	291,611	13,275	- Tommy Pinkston Family Memorial Scholarship	43,014	1,984
Trinity School	96,677	4,443	- James Shaw Scholarship	24,261	1,080
Villa Teresa School	122,037	5,236	- Trotter-Gambel Scholarship	22,923	1,025
Westminster School	429,082	19,557	- Additional Scholarship Funds	176,091	-
- Gregory L. Shadid Memorial Scholarship	125,698	5,703	St. Gregory's Scholarships		
Education: Scholarship and Support Organizations			- Scholarships for Women	136,878	6,115
Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha	22,925	917	- Vogt Fund	28,126	1,293
Kimberly Kay Clark Naval Reserve Association Scholarship	24,682	1,027	Southern Nazarene University Scholarship	31,321	1,274
Oklahoma Engineering Foundation Scholarship	146,707	6,733	Francis Tuttle Foundation	192,793	8,730
Oklahoma Pilots Association Vic Jackson Scholarship	42,152	1,757	United States Air Force Academy/ John E. Kirkpatrick Fund	351,846	16,170
			United States Military Academy/ John E. Kirkpatrick Fund	352,093	16,182

	Market Value as of 6-30-2011	FY 2011 Distribution		Market Value as of 6-30-2011	FY 2011 Distribution
United States Naval Academy/ John E. Kirkpatrick Fund	\$ 351,852	\$ 16,171	Oklahoma Medical Research Foundation	\$ 314,744	\$ 14,432
University of Central Oklahoma			- Fleming Scholarship	489,407	22,459
- Fine Arts Fund	91,280	4,126	- D. Allan & Dorothy B. Harmon Memorial	91,297	4,189
- Kirkpatrick Service Awards	408,918	18,371	- Research Fund	20,178	926
- Nursing Scholarship	26,484	1,217	Oklahoma Physical Therapy Foundation	76,107	3,422
University of Central Oklahoma/ Department of History and Geography			Planned Parenthood of Central Oklahoma	276,697	11,774
- Diane Neal Kremm Fund	29,776	1,364	- Cleo Cross Fund	8,976	413
University of Oklahoma Health Sciences Center			Prevent Blindness Oklahoma	20,176	939
- Robert M. Bird Society	154,599	6,598	Referral Center for Alcohol and Drug Services	87,411	4,017
- Medical College Alumni Association Research Fund	32,450	1,385	Russell-Murray Hospice	42,206	1,363
- Watson Scholarship	28,641	1,222	St. Anthony Hospital Foundation	331,538	15,211
University of Oklahoma Norman			United Cerebral Palsy	63,282	2,908
- Bizzell Memorial Library	182,170	8,372	Variety Care	388,233	12,164
- Jerry Cooper Marching Band Scholarship	61,816	2,701			
- Fred Jones Jr. Museum of Art	206,160	9,343			
- Naval ROTC	122,755	5,458			

Environment & Animals Organizations

Best Friends of Pets	44,818	1,803
Choctaw Parks Foundation		
- Historical Sculpture Gardens Perpetual Care	81,553	1,950
Free to Live	305,480	13,746
Friends of Martin Park Nature Center	47,743	2,188
Morris Animal Foundation	153,101	6,988
Myriad Gardens Foundation	122,695	5,611
The Nature Conservancy/Oklahoma Chapter	238,324	10,948
- James K. Hotchkiss Fund	323,171	14,513
Oklahoma City Beautiful	252,803	11,040
- Morrison Tucker Award	44,914	2,004
- Wildflowers Fund	45,001	2,010
Oklahoma City Geological Foundation	21,923	1,011
Oklahoma Horticultural Society	95,072	4,142
Oklahoma Iris Society	22,360	981
Oklahoma River Foundation	570,043	20,810
Oklahoma Zoological Society	793,925	29,682
The Tree Bank	186,217	7,444

Health-Related Organizations

Alzheimer's Association/ Oklahoma & Arkansas Chapter	33,199	1,427
American Cancer Society	174,819	8,005
American Diabetes Association	50,602	2,322
Arthritis Foundation/Oklahoma Chapter	112,672	5,028
Cavett Kids Foundation	106,119	4,607
The Children's Center	285,363	12,724
Children's Hospital Foundation	202,357	9,144
Community Health Center/Mary Mahoney Memorial Health Center	128,009	5,318
Epilepsy Association of Oklahoma	138,263	5,954
Integris Baptist Medical Center	696,441	31,935
- Baptist Burn Center	432,381	19,826
- James L. Hall Jr. Center for Mind, Body & Spirit	146,088	6,703
Integris Southwest Medical Center	47,100	2,166
The Leukemia & Lymphoma Society	21,805	1,014
Lupus Foundation of America/ Oklahoma Chapter	28,450	1,317
Dean A. McGee Eye Institute	269,526	12,228
Mercy Health Center	225,487	10,339
National Multiple Sclerosis/Oklahoma Chapter	17,532	812
Oklahoma Children's Chiropractic Center	26,413	1,224
Oklahoma Blood Institute	19,744	908
Oklahoma Brain Tumor Foundation	21,071	958

History & Preservation Organizations

45th Infantry Division Museum	321,111	13,377
95th Division Foundation	54,476	2,332
Arcadia Historical & Preservation Society	26,001	1,037
Break O'Day Farm and Metcalfe Museum	67,647	1,794
Cleveland County Historical Society	19,938	919
Edmond Historical Society	49,486	2,165
Freedoms Foundation at Valley Forge		
- Oklahoma Chapter**	39,257	-
Friends of Oklahoma Historical Society Archives	64,905	2,717
Frontier Country Historical Society	26,036	1,197
William Fremont Harn Gardens and Homestead	921,644	41,999
- 1889ers Fund	10,483	481
Oklahoma Archaeological Survey	24,003	1,061
Oklahoma City-County Historical Society	221,223	8,637
Oklahoma Heritage Association	183,491	8,067
- Gary & Elizabeth Huckabay Scholarship	17,231	792
- Scholarship Fund	162,274	7,458
Oklahoma Historical Society		
- Cross S Ranch	101,402	4,454
Oklahoma Historical Society		
- Guthrie Carnegie Library	25,468	1,116
Oklahoma Historical Society		
- Oklahoma History Center	1,421,965	64,661
- Emily Bell Fund	203,188	9,245
- Nahzi & Annette Zudhi Fund	255,893	11,648
Oklahoma Railway Museum	45,569	1,457
Oklahoma State Firefighters Museum	50,503	2,321
Oklahoma Westerners Indian Territory Posse	80,633	3,209
Overholser Mansion	123,970	5,693
- Dianne Gumerson Memorial	9,336	413
Preservation Oklahoma	30,002	1,378
Sillwater Museum Association/Sheerar Museum	18,758	875
Westerners International	153,322	6,925

Neighborhood Associations

Capitol View Neighborhood Association	34,395	1,587
Crown Heights-Edgemere Heights Neighborhood Association	223,830	8,716
Edgemere Park Preservation Area	54,673	2,228
Historic Brookhaven Neighborhood Association	93,020	4,275
Mesta Park Neighborhood Association	70,154	2,965
Neighborhood Alliance of Oklahoma City	98,674	4,501
Oklahoma City Housing Services Redevelopment Corp. Positively Paseo	172,025	7,892
Putnam Heights Preservation Area/ Anderson Family Endowment	71,281	3,179
Shartel Boulevard Development Authority	123,891	5,250

Religious Organizations

4HIM - His Healing Helping Hands International Ministries	40,933	1,725
--	--------	-------

Scholarship and Award Funds

The Scholarship and Award Funds listed below represent permanent endowment funds that were established with gifts from more than one donor. We also administer funds that award scholarships and were established by one donor. Donors who are the lone source of support for an endowment fund receive a custom report about the fund.

	Market Value as of 6-30-2011		Market Value as of 6-30-2011
Ray & Lucille Ackerman Oklahoma City University Marketing Scholarship *	28,196	Dr. Edith King Mental Health Court Scholarship	22,111
Mike Allen Memorial Education Fund	46,970	Rev. Kenneth King Memorial Scholarship	64,533
Aaron Alley Memorial Scholarship	44,181	Kirshner Trust Scholarship	216,303
H.W. Almen/West OKC Rotary Scholarship	1,694,614	Valerie Koelsch Memorial Scholarship	44,184
American Society of Civil Engineers Scholarship	30,551	PFC Anthony Adam Landers "Zero To Hero" Scholarship	14,687
American Society of Landscape Architects Scholarship	40,203	Sally Jo Clark Langston Memorial Scholarship*	23,805
Andersen-Spraberry Scholarships	224,218	Wann & Clara Langston Scholarship	45,494
BSO Ivy Foundation Scholarship	29,637	Charles Thomas "Tommy" Lewis Memorial Fund	38,124
John Barresi Memorial Scholarship	37,293	Judy Love Community Foundation Scholar Award*	29,748
J. Edward Barth Community Foundation Scholar Award	43,384	Albert & Freda Marottek Scholarship	11,182
John Blaess Memorial Scholarship	10,528	June Mitchell McCharen Scholarship*	54,894
Patrick S. Bonds Memorial Scholarship	46,290	McGee Foundation Scholarship Fund	707,031
Vinita F. Boyer Scholarship	90,781	Frank McPherson Community Foundation Scholar Award	20,793
Alberta Brannon Memorial Scholarship	11,658	Benny McReynolds Memorial Scholarship	104,122
Dr. Eugene S. Briggs Memorial Scholarship	160,675	Charles C. & Mary Lou Miles Scholarship	24,828
Frank & Merle Buttram String Awards	42,948	Michael Neal Minter Sr. Scholarship	28,280
Capitol Hill High School Award	91,779	Dr. Gary M. Moore Dance & Arts Management Scholarship	135,150
Elizabeth E. Carlson Scholarship	409,564	Dr. Gary M. Moore Great Plan Scholarship	3,003,526
Casady Class of 1996 Scholarship	53,019	Moore High School Alumni Association Scholarships	
Central High School Alumni Association Scholarship	219,380	• George & Doral Hopper Scholarship	
Classen '55 Scholars Fund	126,219	• Hoby & Anita Horn Scholarship*	
Classen Awards Foundation	114,146	• Moore High School Alumni Association	
Classen Class of 1945 Scholarship	40,642	• Music Scholarship*	
Classen Class of '54 Scholarship	35,250	• Bennie Raine Scholarship	
Ralph Clinton Scholarship - Sales & Marketing Executives	56,009	Muskogee Public Schools Adult Day Camp Fund	161,489
Brad R. Corbett Memorial Academic Trust	89,307	Ronald J. Norick Community Foundation Scholar Award	24,572
Jean Hawley Curtis Scholarship	36,315	Northwest Classen High School Class of 1956 Scholarship	49,061
Harley Custer Memorial Scholarship	49,241	Paul B. Odom Jr. Community Foundation Scholar Award	24,535
Dana Corporation Scholarship	115,947	OKC Northwest Lions Club Scholarship	28,471
James R. Daniel Community Foundation Scholar Award*	29,748	Oklahoma Goodwill Industries Abilities Scholarship	39,636
Dortha Dever Business Scholarship	59,587	Orner-Cook Scholarship	61,534
Douglass High School Class of 1967 Scholarship	23,210	Deborah R. & Wayne A. Parker Scholarship	128,818
Paul W. Dudman Community Foundation Scholar Award	33,400	Sen. Homer Paul Memorial Scholarship for Pauls Valley High School	39,410
Durant Community Scholarship	84,940	Pi Beta Phi Alumnae Club Scholarship	107,637
Early Childhood Association of Oklahoma Scholarship	32,052	Pilot Club Scholarship	9,440
Mark Allen Everett Graduate Fellowship in String Performance - University of Oklahoma School of Music	260,330	Floy I. Pinkerton Vocal Music Scholarship	11,392
Barbara Fagin Award Fund - Christmas Connection	36,653	Larry W. Roach Leadership Award	22,028
Brunel D. Faris Art Exploration Scholarship	31,500	Jeffrey Rogers Education Memorial Scholarship	60,493
Daniel & Jay Feiler Scholarship	28,022	Mary Baker Rumsey Volunteer Award - Junior League of Oklahoma City	53,983
Irene P. & Samuel F. Frierson Educational Trust	1,615,701	Seay A. Sanders Jr. Scholarship	23,713
Wauhillaux Austin Gale Memorial Scholarship	29,502	Mary & Spencer Sessions Teaching Award	30,156
Edward King Gaylord Scholarship	1,266,836	William F. Shdeed Community Foundation Scholarship	35,609
Elsie Mae "Nat" Glosemeyer Scholarship	46,719	Lorene Sherman Memorial Scholarship	29,595
Freda Poole Grayson Scholarship	19,591	Willie Elizabeth Shipley Scholarship	424,727
John E. Green Community Foundation Scholars Award	33,400	Joe B. Smith Memorial Class of 1942 Scholarship Fund	81,375
Anita Hill Scholarship - Survivors' Education Fund	49,057	Robert V. Smith Memorial Scholarship	31,823
James H. Holloman Jr. Community Foundation Scholar Award	27,846	Society of Petroleum Engineers International, Oklahoma City Section Scholarship*	262,554
Geneva Hood Award - Casady School	53,019	Pete & Lela Stavros Scholarship	72,114
Mary Beatrice House Scholarship	22,577	Wendell Steward Scholarship	20,911
Hudiburg Family Fund Scholarship	143,670	Troop 193 Leadership Scholarship	81,144
Hutch's Scholar Award		Brian Wechsler Memorial Scholarship	38,011
Hutchinson Scholarship		Michael J. Weiss Scholarship	178,264
Iron Workers Local 584 & Signatory Contractors Scholarship	58,977	Western Oklahoma Building Trades Scholarship	24,418
Virgil & Pauline Jackson Scholarship	115,170	Westside Lions Club Scholarship	11,947
Dennis James Scholarship -Deer Creek Baseball Fund	40,125	James Whitfield Employee Scholarship	47,140
Miles Jenkins Memorial Scholarship	23,746	Dean Wild Memorial Scholarship	31,637
Kay Jewell Scholarship	18,669	Deral E. Willis Scholarship	18,321
William M. & Janet S. Johnson Scholarship	2,663,180	James M. Wilson Scholarship	22,254
Jones High School Scholarship	45,675	Tracy Wilson Memorial Scholarship	45,064
Friends of Kim Jones - Shelton Scholarship	19,639	Mildred & William Young Scholarship	31,903
Dorothy Detrick Kendall Piano Scholarship Award - University of Oklahoma School of Music	35,115	Dan Zanowiak Memorial Scholarship	54,033

Options for Giving Now

To make charitable giving as easy and flexible as possible, we accept a wide variety of gifts.

Cash Gifts

Cash is one of the easiest ways to make a charitable contribution. A cash gift to the Oklahoma City Community Foundation can be in the form of cash, check, money order or cashiers check.

Credit Cards

Through our secure online giving website and in partnership with PayPal, we accept American Express, MasterCard, Discover and Visa. Use any of these credit cards to make a gift to an endowment fund. You can access the site at www.occf.org/onlinegiving.

Real Estate

Real Estate may be given at appraised value. If appreciated, capital gains tax may be avoided on the real estate appreciation if the property is contributed directly to a fund at the Oklahoma City Community Foundation. Gifting real estate may allow you to preserve liquid assets while maximizing your charitable contributions.

Business-Related Assets

We accept gifts of individually-owned business assets such as closely held C-corp. and S-corp. stock, partnerships and LLCs and will direct the assets to the endowment or endowments as specified by the donor.

Stocks, Bonds and Mutual Funds

If appreciated, marketable or closely-held securities such as stocks, bonds and mutual funds can offer significant tax savings while maximizing charitable contributions. The securities may be given so that you receive an income tax deduction equal to the fair market value of the donated assets while avoiding the capital gains tax. We have accounts at most brokerage firms and can arrange for the transfer of the donated securities.

Oil and Gas Interests & Royalty Interests

Both oil and gas royalty interests may also be donated to the Oklahoma City Community Foundation. Gifts of oil and gas interests may allow for the preservation of liquid assets while maximizing charitable contributions.

Life Insurance

A life insurance policy can be an effective means to fund a charitable giving plan without significant outlays of cash. When the policy is gifted, you receive a tax deduction for the current cash value, and future premiums could be funded with additional tax deductible contributions. Also, since life insurance generally results in a large payment at one time, this can be an ideal vehicle to initiate family philanthropy by establishing an Advised Fund at the Oklahoma City Community Foundation.

Fund Highlight



Louis and Anna Horn

A Family Inheritance Creates a Lasting Gift

Lifelong members of the Herold Mennonite Church near Bessie, Louis and Anna Horn were devoted to their family and community. Growing up in the western Oklahoma community, both attended Corn Bible Academy and graduated from Corn High School. The couple married in 1940 and remained on the Horn family farm raising two daughters and operating a dairy for 25 years. This income allowed them to send their daughters to college, an important goal for Mrs. Horn as she deeply regretted never continuing her education.

The couple enjoyed serving their church and hosted an annual lye soap-making event in their home for many years, which yielded thousands of pounds of soap that was shipped overseas to be used in hospitals, orphanages and schools in impoverished countries.

Mr. Horn died in 1986, and following Mrs. Horn's death in 2006 their children inherited a large amount of family land, including oil and gas leases.

"My parents worked very hard throughout their lives to acquire and keep this land," says the Horn's daughter Jane Janzen. "We wanted to use our inheritance wisely and honor my parents' hard work and dedication to their church and community."

In 2008, Jane and her husband, Don, established the Louis B. and Anna R. Horn Heritage Fund, an Advised Fund, at the Oklahoma City Community Foundation. They will make grant recommendations from the fund to support the Herold Mennonite Church, Corn Bible Academy and other charitable purposes important to the family.

Giving Later Through A Planned Gift

A planned or deferred gift is a charitable gift made as part of an individual's tax or estate plan that may provide an income benefit to the donor or provides a tax deduction exceeding a single year. We offer the planned giving options outlined below and encourage anyone considering such a gift to discuss this option first with their professional advisor.

Charitable Gift Annuities

A Charitable Gift Annuity (CGA) is available for individuals 55 years or older who want to make a gift with cash or other assets of at least \$20,000, receive income for life and, at the end of the annuity, have the remaining assets go to the charitable fund of their choosing. We offer six CGA options.

Charitable Remainder Trusts

A Charitable Remainder Trust (CRT) allows an individual to place assets in a trust that pays annual income to that person or a beneficiary for life or a set term. A CRT can help the donor avoid capital gains tax on the donated assets and also receive an income tax deduction for the fair market value of the remainder of the trust. In addition, the trust is removed from the estate reducing subsequent estate taxes. Upon the trust's termination, the remaining assets will benefit an existing endowment or Advised Fund.

Charitable Lead Trusts

A Charitable Lead Trust (CLT) allows an individual to transfer assets to the Oklahoma City Community Foundation in order to pay a percentage of the assets' value to an endowment fund designated by the donor. At the end of the trust term, the remaining assets are passed on to the designated beneficiaries. This option offers several advantages including greatly discounted gift or estate taxes for the beneficiaries. In certain cases, a CLT may also provide an income tax deduction at the time the trust is created.

Retirement Plan Assets

Retirement plan assets are subject not only to estate taxes but also income taxes. To reduce this burden on heirs and to create a charitable legacy, an individual can use any retirement plan asset to establish an Advised Fund. Your heirs can serve as advisors to the fund, ensuring that your charitable interests are continued into the future.

Bequests

With a bequest included in a will, a donor can designate a percentage, the residual or an entire estate to benefit an existing fund or to establish a new fund. This option may provide you and your family with substantial reductions in federal estate taxes. We offer sample bequest language on our website at www.occf.org.

Planned Gift Highlight



PHOTO COURTESY JOSEPH MILLS PHOTOGRAPHY

A Lasting Act of Love

Bud and Pauline Ledbetter met while both were students at Casady School. Soon after Bud joined the family business, Ledbetter Insurance Agency, he and Pauline were married. The couple spent their 42-year marriage traveling, discovering new hobbies together and enjoying quiet reprieves at their cabin nestled in northern California's coastal redwood groves.



The Ledbetters were also avid fans and supporters of the Oklahoma City Museum of Art. After Pauline's death in 2002, Bud made arrangements in his estate plans to leave a portion of his remaining retirement plan assets to the Oklahoma City Community Foundation to benefit the museum in Pauline's memory and perpetuate the couple's shared passion for the arts. Bud died in 2007 knowing his last gesture of love to Pauline will benefit future generations who visit the Oklahoma City Museum of Art.

Fiscal Year 2011: A Snapshot

The day-to-day activities of the Oklahoma City Community Foundation are guided by both the mission and vision statements of the organization. Below is a recap of the most recent fiscal year ending June 30, 2011.

Record Best Ever Investment Performance

The 21.57 percent investment performance for the pooled investments for Fiscal Year 2011 was the best in the 18-year history of the pooled investment fund. In addition, it follows a return of 12.99 percent for fiscal year 2010 for a compounded total return for the pooled fund over the past two years of 37.4 percent. You can read more about our investment process on pages 2-4.

Oklahoma City Parks Study Spurs Discussion

For the past 20 years, the Oklahoma City Community Foundation has committed a great deal of time and grant dollars to public parks and lands in Oklahoma County. This commitment was started with a bequest that established the Margaret Annis Boys Trust in 1991. To date, the Margaret Annis Boys Trust has awarded more than 250 beautification grants exceeding \$2 million. Due to this level of investment, we commissioned a comprehensive study of the Oklahoma City Parks System. The study had the following three goals: Assess the current park system with an emphasis on the role of parks in the municipal fiscal setting; assess the city's park system within the context of the seven measures of an excellent park system developed by the Trust for Public Land; and to conduct a review of the operational costs of the newly-renovated Myriad Botanical Gardens, the Bicentennial Park and the proposed MAPS 3 Central Park and how increases in park-related costs will be absorbed into the city's budget. The study findings were released in June 2011 and shared with Oklahoma City officials. Several meetings were held with city council representatives, staff from the planning and parks departments, the city manager's office and the Margaret Annis Boys Trust Committee. The clear consensus from the group was the need for a comprehensive parks plan which should be available in the spring of 2012.

iFund Program Helps Meet Current Community Needs

By utilizing unrestricted funds and several Field of Interest Funds, in February 2011 the Oklahoma City Community Foundation introduced the iFund grants program to help meet community needs in three specific areas: Access to Health Care, Services for Elderly and Opportunities for Children. During the inaugural year, more than \$470,000 was granted to 25 nonprofit organizations. The iFund Program also provides a way for donors to experience the impact of charitable giving. Anyone can make a gift of \$25 or more to one, two or all three iFunds and we will combine those gifts with other funding and ensure that 100 percent of all gifts will be used to award grants. You can learn more about the iFund program at www.ifundokc.org.

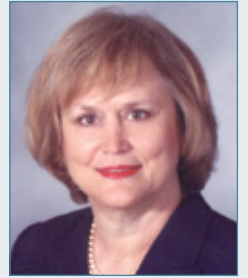


Revisions in Community Programs Area

Through our Community Programs area we are able to provide resources to nonprofit organizations including training, consultation and grants. Since 1997, these activities have been funded by discretionary funds and participation is limited to the more than 300 nonprofit organizations that have an endowment fund at the Oklahoma City Community Foundation. Effective Fiscal Year 2011, several changes were made to the grants portion including the introduction of the Basic Operational Grants and Sustainable Organization Support Grants. The Basic Operational Grants assist smaller nonprofit organizations with first-time organizational and administrative needs such as audits and

Carla Pickrell retires

Carla Pickrell, who joined the Oklahoma City Community Foundation staff in 1986, retired effective Dec. 31, 2010. Carla played an integral role in the growth of the Oklahoma City Community Foundation. During her tenure, Carla initially served as comptroller and later director of administration. In the 24 years of her service, the assets of the Oklahoma City Community Foundation increased from \$30 million to more than \$600 million and more than 1,000 endowment funds. Prior to her retirement, Carla's responsibilities included oversight of the investment program and financial reporting to donors and charitable organizations.



"Carla's participation in the growth of this organization is immeasurable and her contribution to the quality of service that we provide has been without precedence," says Nancy B. Anthony, executive director. "There is no doubt that without her dedication, expertise and commitment to excellence, the Oklahoma City Community Foundation would not be where it is today."

strategic planning. The Sustainable Organization Support grants seek to strengthen the skills, abilities and resources of an organization so it can survive, adapt and thrive. In addition, a new evaluation and measurement tool was implemented so that both the organizations and the Oklahoma City Community Foundation can better measure the impact of the grant dollars.

Scholarship Endowment Area Continues to Grow

Scholarship and award funds remain a popular vehicle for donors. During Fiscal Year 2011, six endowment funds were established bringing the total number of scholarship and award endowments to 157. In addition, we administer a number of charitable organization endowment funds that support scholarships for organizations and educational institutions. In all, 507 worthy students received a scholarship from an endowment at the Oklahoma City Community Foundation during the fiscal year. The program remains the state's largest independent scholarship program.

Enhanced Online Giving Service

For nearly 10 years, we have offered online giving as an easy and secure method for donors to make credit card gifts to endowment funds at the Oklahoma City Community Foundation. In Fiscal Year 2011, we enhanced this process by partnering with PayPal to process the gifts to make the experience easier and more convenient. Donors can visit www.occf.org/onlinegiving to make a direct gift to an endowment fund.

Funds, Gifts and Grants

During Fiscal Year 2011, 63 new funds and 17 new planned gifts were established. This compares to 53 and eight respectively in Fiscal Year 2010. In all, total new gifts received during the year exceeded \$17 million. Total grants for the year were in excess of \$19.5 million and includes annual distributions from charitable organization endowment funds of more than \$5.3 million, advised fund grants of nearly \$11.7 million as well as scholarship distributions, discretionary grants and program expenses.

Connect with Us!



Stop in and visit with us

We are located in historic Automobile Alley in downtown Oklahoma City. Our address is 1000 N. Broadway Ave. (the southeast corner of North 10th Street and North Broadway Avenue). Our office hours are 8:30 a.m. - 5 p.m., Monday - Friday.

Visit www.occf.org:

- Learn how to start a fund and find out what gifts we can facilitate.
- Donate online to any of our endowed funds using a major credit card.
- Discover Legacy Giving, our online planned giving resource for donors and professional advisors.
- Read our recent publications and news releases.



Find us on Facebook, Twitter and YouTube



Visit www.facebook.com/occf.org for the latest on our activities and nonprofit news.



Follow us on Twitter @occforg.



Visit our YouTube channel at www.youtube.com/occforg to view and share television commercials about donors, their gifts and the impact these gifts have on our community. You can also view our videos on recent grants and projects.

Give us a call

Let us help answer any questions you may have regarding charitable giving. Call us at 405/235-5603.