

## Know More, Give More with GiveSmartOKC

*Connecting Charitable Organizations With the Community*

In a time where phone books are nearly obsolete, the Internet has become the go-to resource for information. Whether you are searching for an address or the latest movie reviews, an endless amount of information is readily available online. But where do donors go to find more information when considering making a charitable gift to a local nonprofit? Or how might someone discover what charitable organizations in Oklahoma need volunteers? The Oklahoma City Community Foundation believes that GiveSmartOKC.org will provide answers to those questions and much more.

GiveSmartOKC.org is a website providing a knowledge base about area charitable



organizations to help encourage informed philanthropy within our community. Open to any nonprofit providing services in central Oklahoma, GiveSmartOKC offers charitable organizations the opportunity to highlight their commitment to transparency and provide up-to-date, in-depth information about their organization. The data provided is verified as being current and all financial information is vetted by the Oklahoma City Community Foundation accounting staff.

“By providing this level of charitable data we are promoting awareness of needs and fostering informed giving within our community,” says Nancy B. Anthony, president. “By participating in GiveSmartOKC, charitable organizations are literally opening their file cabinets and sharing information you won’t find on their websites. We also hope that they will use their GiveSmartOKC profile as a tool to assess their own best practices.”

### What You’ll Find

Each nonprofit profile features 62 required data points about four areas of nonprofit effectiveness: programs, management, governance and financials. Charitable organizations are required to answer questions about their policies and strategies, as well as key factors such as board support, tax returns, audits and revenue and expense ratios. All information on GiveSmartOKC is free to the public and searchable by a variety of

*See GiveSmartOKC on next page*



PHOTO BY BRYAN CARDINALE-POWELL

*Oklahoma Children’s Theatre was one of the first area charitable organizations to complete a profile on GiveSmartOKC. The group provides theatrical productions targeted to children’s audiences and productions staged by children such as “Alice’s Adventures in Wonderland” pictured above.*

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## GiveSmartOKC

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ways including organization name, geographic location, interest area or keywords.

“GiveSmartOKC will enable our philanthropic community to make more informed and enlightened decisions to meet local needs,” says Dan Billingsley, resource development and communications director for the Oklahoma Center for Nonprofits. “The data collected from this project over time will be invaluable in communicating the real economic and civic impact of Oklahoma’s charitable organizations.”

### A Resource for Funding Organizations

As the only local resource of its kind, GiveSmartOKC provides an opportunity for area funding organizations to use the service in their grant-making processes. Beginning in 2013, the Kirkpatrick Family Fund will utilize GiveSmartOKC for its grant program.

“We are optimistic that GiveSmartOKC will allow the Kirkpatrick Family Fund to streamline our application process for Oklahoma City nonprofit organizations,” says Liz Eickman, director of the Kirkpatrick Family Fund. “This central site provides easy to access multiple-year financial and program information on participating organizations providing services in central Oklahoma. Funders and donors will find GiveSmartOKC to be a useful resource which will support their process of making funding decisions.”

Nonprofits participating in the Oklahoma City Community Foundation’s Charitable Organization Endowment program will also be asked to maintain a current GiveSmartOKC profile to meet the requirements for their annual distribution. As of Sept. 26, more than 100 charitable organizations have completed profiles on GiveSmartOKC and more profiles are being added daily.

Oklahoma Children’s Theatre executive director Lyn Adams says that GiveSmartOKC provides her with a complete picture of the organization’s finances, management and programs in a format that is simple to maintain and update. Additionally, she says, it allows donors to easily access crucial and current information about the organization.

“When it comes to connecting with donors and the community in an active and accessible forum, GiveSmartOKC says it all for us,” Lyn says.

### Get Started

To begin using GiveSmartOKC, visit [www.GiveSmartOKC.org](http://www.GiveSmartOKC.org) and select FIND to search for charitable organizations in central Oklahoma. The nonprofits with charitable organization endowment funds that have published profiles as of Sept. 20 are noted with a ■ on pages 3-8 of this publication. To request a nonprofit profile on GiveSmartOKC, charitable organizations should email [givesmartokc@occf.org](mailto:givesmartokc@occf.org) or call us at 405/235-5603.

## How can you use GiveSmartOKC?



### Donors:

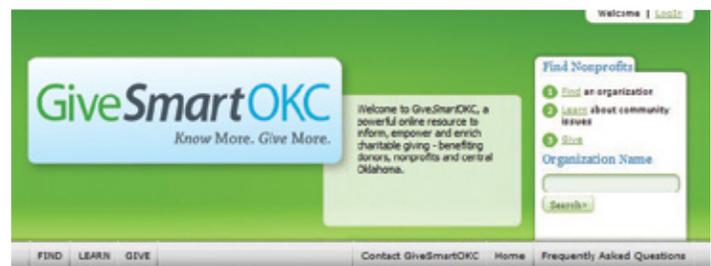
- **Find** charitable organizations that are serving the needs of central Oklahoma.
- **Learn** more about the programs, governance, management and financials of charitable organizations you support.
- **Give** your charitable dollars with confidence that your gift will be spent wisely and truly make a difference.
- If you don’t find your favorite charitable organization on GiveSmartOKC, encourage them to complete a profile to highlight their commitment to transparency and best practices.

### Charitable Organizations:

- Illustrate your organization’s effectiveness by providing detailed information about four key areas: programs, governance, management and financials.
- Increase your online presence and educate your donors and the community about your programs and services and your overall health as an organization.
- Use your profile to enhance grant applications and connect with potential funders.
- Evaluate your organization’s practices to build capacity, strategically plan and enhance your sustainability.

*“When it comes to connecting with donors and the community in an active and accessible forum, GiveSmartOKC says it all for us.”*

- Lyn Adams  
Oklahoma Children’s Theatre



# Charitable Organization Endowment Funds

AS OF JUNE 30, 2012

The Charitable Organization Endowment Program has more than 300 permanent endowment funds that are listed on pages 3-8. Included with each endowment is the year the fund was established and the fund balance as of June 30, 2012. Some endowments have subfunds and those are included in the fund balance.

## Arts & Culture

Allied Arts | 1995 ■

\$1,092,860

Ambassadors' Concert Choir | 1990

\$128,067

American Banjo Museum | 2012

\$119,096

American Choral Directors Association | 2009 \*

\$41,775

Arts Council of Oklahoma City | 1977 ■

\$363,137

Canterbury Choral Society | 1982 ■

\$183,967

Chamber Music in Oklahoma | 1974

2 funds: \$222,518

Cimarron Opera Company | 1983

\$137,998

City Arts Center | 1982

\$1,576,302

Fine Arts Institute of Edmond | 1989 ■

\$144,753

Guy Fraser Harrison Academy for the  
Performing Arts | 1997

\$73,893

Individual Artists of Oklahoma/  
Linda Jaeger Memorial | 1998 ■

\$44,594

Jacobson Foundation | 1994

\$64,900

Jazz in June | 2007 \* ■

\$49,304

Ladies Music Club of Oklahoma City | 1997

\$61,478

Lawton Philharmonic Society | 1994

\$91,685

Lyric Theatre of Oklahoma | 1971 ■

2 funds: \$1,393,023

Melton Art Reference Library/Legacy

Collection | 1994

2 funds: \$98,125

Jasmine Moran Children's Museum | 1993

\$111,175

National Cowboy & Western Heritage

Museum | 1991

\$1,362,605

National Cowboy & Western Heritage

Museum - Docent Council | 2006

\$27,413

OK Chorale | 2002 \*

\$45,474

Oklahoma Arts Institute | 1978

\$235,128

Oklahoma Children's Theatre | 1978 ■

\$96,954

Oklahoma City Ballet | 1975 ■

\$186,805

Oklahoma City Museum of Art | 1992

6 funds: \$7,918,234

Oklahoma City Orchestra League | 1984

\$368,684

Oklahoma Community Theatre ■

Association | 1986

2 funds: \$44,768

Oklahoma Museums Association | 1994 ■

\$88,990

Oklahoma Philharmonic Society | 1995 ■

3 funds: \$4,726,978

Oklahoma Shakespeare in the Park | 1989

\$78,205

Oklahoma Visual Arts Coalition | 1998 ■

\$80,154

Opry Heritage Foundation of Oklahoma | 2012

\$19,260

Paseo Artists Association | 1992 ■

\$69,328

Photographic Society of America | 2010 \*

\$50,942

Prairie Dance Theatre | 1979

\$101,342

Red Earth | 1983

2 funds: \$193,853

Science Museum Oklahoma | 1991

3 funds: \$58,107,140

## Community Development Organizations

Association of Fundraising

Professionals | 2001 \* ■

\$27,604

Cimarron Alliance Foundation | 2006 \*

\$21,679

Crime Stoppers of Oklahoma City | 1983

\$82,573

ESCCO - Executive Service Corps of

Central Oklahoma | 2007 \* ■

\$45,373

Executive Women International | 1982

\$131,603

Impact Oklahoma | 2008 \*

\$38,395

Jewish Federation of Greater

Oklahoma City | 1978

2 funds: \$463,017

Junior Hospitality Club | 1980

\$176,683

Junior League of Oklahoma City | 1977

\$235,364

Kiwanis Club Special Activities | 2000

\$71,300

L'Alliance Francaise d'Oklahoma | 2009

\$120,197

Leadership Oklahoma City | 1994 ■

2 funds: \$994,544

League of Women Voters of Oklahoma | 1999

\$44,702

Midwest City Rotary Foundation | 2008 \*

\$29,212

National Society of Colonial Dames

of America in Oklahoma | 1979

\$187,249

Navy League for USS Oklahoma City/  
E6-A Squadron | 1984

2 funds: \$116,673

The Ninety-Nines and The Ninety-Nines

Museum of Women Pilots | 1990

2 funds: \$111,256

Oklahoma Center for Nonprofits | 1993 ■

\$127,844

Oklahoma City All Sports

Scholarship Fund | 1995 ■

\$44,857

Oklahoma City Boathouse Foundation | 2007

\$162,836

Oklahoma City Foundation

for Architecture | 2009

\$137,835

Oklahoma County Bar Foundation | 1996

\$292,639

Oklahoma Lions Service Foundation | 1992

\$157,453

Redbud Foundation | 2000 ■

\$48,751

Rotary Club 29 Foundation | 1993

\$218,422

Jim Thorpe Association | 2010 \*

\$42,335

Women of AT&T, Oklahoma City Chapter | 2008

\$20,714

Women of the South | 2002

\$19,362

*Continued on next page*

## Education: Community Organizations

FOLIO - Friends of Libraries in Oklahoma | 2009 \* ■ \$55,154

Friends of the Metropolitan Library System | 1983 ■ \$122,785

Friends of the Mustang Public Library | 2006 ■ \$43,061

Friends of the Norman Public Library | 2002 \$50,760

Institute of International Education | 1987 3 funds: \$439,474

Library Endowment Trust | 1991 ■ 2 funds: \$332,436

Oklahoma Humanities Council | 1994 ■ \$148,224

Oklahomans for Special Library Services | 1997 \$348,120

Payne Education Center | 1987 ■ \$135,756

Weatherford Public Library Foundation | 2010 \* ■ \$42,756

## Education: Preschool - 12th Grade

Calumet School Foundation | 2003 \$31,940

Casady School | 1977 8 funds: \$4,876,615

Celebrations Preschool | 1977 \$143,206

Christ the King Catholic School | 1997 2 funds: \$123,360

Christian Heritage Academy | 2008 \* \$190,868

Crescent Public Schools Foundation | 2009 \$26,337

Deer Creek Public Schools | 1995 \$1,638,690

Edmond Public Schools Foundation | 1989 3 funds: \$354,440

El Reno Public School Foundation/ Wilbur and Jean Gardner Scholarship | 2006 2 funds: \$101,565

Erna Krouch Preschool | 1979 \$72,096

The Foundation for Oklahoma City Public Schools | 1997 \$202,693

Guthrie Educational Foundation | 2009 \* \$41,829

Heritage Hall Schools | 1996 4 funds: \$1,652,449

Bishop McGuinness Catholic High School | 1985 \$181,797

Midwest City-Del City Public Schools Foundation | 2000 ■ \$351,946

Millwood School District Enrichment Foundation | 2009 \$29,259

Moore Public Schools Foundation for Academic Excellence | 2001 \$128,869

Mount St. Mary Catholic High School | 1983 ■ 2 funds: \$464,306

Oklahoma Christian School | 2008 \$46,293

Oklahoma FFA Foundation | 2000 ■ \$1,438,648

Oklahoma Foundation for Excellence | 1988 ■ \$149,696

Oklahoma Foundation for the Education of Blind Children & Youth | 1998 \$40,705

Oklahoma School of Science and Mathematics | 1990 \$301,426

Positive Tomorrows | 1997 ■ \$386,233

Putnam City Public Schools Foundation | 1992 ■ \$445,084

Rosary Catholic School | 1996 \$104,464

Sacred Heart Catholic School - El Reno | 2000 \$367,703

St. Charles Borromeo Catholic School | 1998 \$70,428

St. Elizabeth Ann Seton Catholic School | 1997 \$57,136

St. James Catholic School | 1991 \$227,000

St. John Christian Heritage Academy - Waltine Lynette Jackson Endowment | 1996 \$131,347

St. John's Episcopal School | 1983 4 funds: \$187,140

St. Mary's Episcopal School of Edmond | 1994 \$153,770

Southeast High School Alumni Support | 2012 \$20,484

Special Care | 1988 ■ \$281,733

Trinity School | 1989 \$93,622

Westminster School | 1975 2 funds: \$537,896

## Education: Scholarship and Support Organizations

Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha | 2007 \* \$43,692

Kimberly Kay Clark Naval Reserve Association Scholarship | 1995 \$25,933

Markoma Christian Ministries | 2007 \$918,942

Moore High School Alumni Association Scholarship | 2005 5 funds: \$143,626

Oklahoma Engineering Foundation Scholarship | 2000 ■ \$142,040

Oklahoma Pilots Association Vic Jackson Scholarship | 1997 \$41,156

OSU Agricultural Education Scholarship Inc. | 2000 \$500,988

Will Rogers Air National Guard Scholarship | 1997 \$47,081

Society of Petroleum Engineers International, OKC Section, Endowed Scholarship | 2010 \$253,274

A. Kurt Weiss Lectureship | 2007 \$87,970

Marie Welch Independent Insurance Agents of Oklahoma Scholarship | 1992 \$70,472

## Education: College, Universities & Vocational Schools

Hillel Foundation/University of Oklahoma | 1982 ■ 4 funds: \$667,517

Langston University | 1985 7 funds: \$963,298

Oklahoma Baptist University | 1980 ■ 5 funds: \$632,744

Oklahoma Christian University | 1971 ■ 3 Funds: \$1,476,634

Oklahoma City Community College | 1983 \$227,378

Oklahoma City University | 1971 8 funds: \$2,669,819

Oklahoma City University Film Institute | 1998 \* \$41,696

Oklahoma City University Law School | 1976 3 funds: \$694,742

Oklahoma State University/School of Civil & Environmental Engineering | 1998 \$17,924

Oklahoma State University/School of Civil & Environmental Engineering - James D. & Laverna L. Cobb Fund | 2009 \$132,199

Oklahoma State University - Oklahoma City | 1983 5 funds: \$551,297

OIC - Opportunities Industrialization Center | 1979 ■

\$245,154

Redlands Community College | 2007 ■

26 funds: \$536,475

St. Gregory's University | 1979 ■

2 funds: \$159,980

Southern Nazarene University Scholarship | 2001 \*

\$40,631

Francis Tuttle Foundation | 1993

\$186,670

United States Air Force Academy/

John E. Kirkpatrick Fund | 1978

\$339,677

United States Military Academy/

John E. Kirkpatrick Fund | 1979

\$339,915

United States Naval Academy/

John E. Kirkpatrick Fund | 1978

\$339,683

University of Central Oklahoma | 1992

3 funds: \$512,189

University of Central Oklahoma/  
Department of History and Geography

- Diane Neal Kremm Fund | 2000 \*

\$29,012

University of Oklahoma/Jerry Cooper Marching  
Band Scholarship | 1991

\$59,699

University of Oklahoma/

Bizzell Memorial Library | 1979

\$175,869

University of Oklahoma/Fred Jones Jr.

Museum of Art | 1993

\$199,049

University of Oklahoma Health Sciences Center  
Campus | 1988

3 funds: \$218,774

University of Oklahoma/Naval ROTC | 1988

\$118,562

## Environment & Animals Organizations

Best Friends of Pets | 2004 ■

\$45,345

Choctaw Parks Foundation - Historical  
Sculpture Gardens Perpetual Care | 2006

\$93,912

Free to Live | 1992 ■

\$296,321

Friends of Martin Park Nature Center | 1998

\$48,466

Morris Animal Foundation | 1996 ■

\$147,812

Myriad Gardens Foundation | 1987

\$118,927

*Continued on next page*



PHOTO PROVIDED

*CCFI provides family support and youth enrichment services through its free afterschool and summer programs for children ages four-17.*

## Center for Children and Families, Inc.

Every child deserves to grow up in a safe, nurturing and loving environment. This is the founding principle behind the Center for Children and Families, Inc. (CCFI), a charitable organization that provides education, prevention and treatment services for families coping with abuse, neglect, divorce and other adverse experiences.

Established in 1969 as a shelter for children prior to entering the foster care system, CCFI has evolved to provide a broad range of services including therapy and support for victims of child abuse and neglect, education for families and teen parents and afterschool and summer programs for children.

CCFI offers seven programs that offer services from teenage parenting classes, parent education and support groups and a baby pantry that is stocked with formula, baby and toddler food, diapers and other necessities. The organization's Neighborhood Centers provide a mix of academic, recreational and cultural activities for children ages four to 17. The centers are open after school hours, during evenings and in the summer. Programs are free of charge and are located in four neighborhoods throughout Norman. The organization's goal is to see the program expand to every school in the community.

In 2009, CCFI established a Charitable Organization Endowment at the Oklahoma City Community Foundation to help support the organization's services.

"Over time, this endowment will help to stabilize operating funds so programs and services can continue for the next 40 years and beyond," says Katie Fitzgerald, CCFI executive director.

Oklahoma City Beautiful | 1993  
3 funds: \$337,299

Oklahoma City Geological Foundation | 2004  
\$21,046

Oklahoma Horticultural Society | 1989  
\$92,532

Oklahoma Iris Society | 2009  
\$21,513

Oklahoma River Foundation | 2005  
\$589,374

Oklahoma Zoological Society | 1971 ■  
\$776,370

The Nature Conservancy/  
Oklahoma Chapter | 1993 ■  
2 funds: \$542,239

The Tree Bank | 1990  
\$185,037

### Health-Related Organizations

Alzheimer's Association/  
Oklahoma & Arkansas Chapter | 2003 \*  
\$37,256

American Cancer Society | 1975  
\$169,332

American Diabetes Association | 1977  
\$48,998

Arthritis Foundation/Oklahoma Chapter | 1992  
\$109,797

Cavett Kids Foundation | 2001  
\$102,566

The Children's Center | 1996  
2 funds: \$276,570

Children's Hospital Foundation | 1985 ■  
\$195,981

Community Health Center/Mary Mahoney  
Memorial Health Center | 1999 ■  
\$130,375

Epilepsy Association of Oklahoma | 1981 ■  
\$143,734

Integrus Baptist Medical Center | 1973  
2 funds: \$1,094,767

Integrus Baptist Medical Center/James L. Hall  
Jr. Center for Mind, Body & Spirit | 1999  
\$141,440

Integrus Southwest Medical Center | 1977  
\$45,593

The Leukemia & Lymphoma Society | 1999  
\$20,930

Lupus Foundation of America/  
Oklahoma Chapter | 1995  
\$27,413

Dean A. McGee Eye Institute | 1972  
\$261,023

Mercy Health Center | 1971  
\$218,253

National Multiple Sclerosis/  
Oklahoma Chapter | 2000  
\$16,879

Oklahaven Children's Chiropractic Center | 1999  
\$25,427

Oklahoma Blood Institute | 2008 \*  
\$19,280

Oklahoma Brain Tumor Foundation | 2006 \*  
\$22,530

Oklahoma Caring Foundation | 2012 ■  
\$20,320

Oklahoma Medical Research Foundation | 1983  
4 funds: \$887,709

Oklahoma Physical Therapy Foundation | 2004  
\$73,733

Planned Parenthood of Central Oklahoma | 1982 ■  
2 funds: \$276,824

Prevent Blindness Oklahoma | 2004  
\$19,343

Referral Center for Alcohol  
and Drug Services | 1992  
\$84,388

Russell-Murray Hospice | 2006 \*  
\$47,953

St. Anthony Hospital Foundation | 1973  
\$320,991

Stroud Regional Medical Center  
Foundation | 2012  
\$30,348

United Cerebral Palsy | 1988  
\$61,269

Variety Care | 1985  
2 funds: \$364,047

### History & Preservation Organizations

45th Infantry Division Museum | 1984  
\$312,962

95th Division Foundation | 2005  
\$58,697

Arcadia Historical & Preservation Society | 1993 \*  
\$44,556

Break O' Day Farm and Metcalfe Museum | 2007  
\$66,133

Cleveland County Historical Society | 2004  
\$19,432

Edmond Historical Society | 1999 ■  
\$47,940

Freedoms Foundation at Valley Forge  
- Oklahoma Chapter | 2010 \*  
\$38,849

Friends of Oklahoma Historical  
Society Archives | 1998  
\$67,392

Frontier Country Historical Society | 2009  
\$25,060

William Fremont Harn Gardens  
and Homestead | 1987  
2 funds: \$904,239

Oklahoma Archaeological Survey | 1995 \*  
\$23,445

Oklahoma City-County Historical Society | 1979  
\$228,721

Oklahoma Heritage Association | 1978 ■  
3 funds: \$356,315

Oklahoma Historical Society  
- Oklahoma History Center | 1974  
6 funds: \$1,952,835

Oklahoma Railway Museum | 2004 \*  
\$46,220

Oklahoma State Firefighters Museum | 1999  
\$51,327

Oklahoma Westerners Indian  
Territory Posse | 1975  
\$86,210

Overholser Mansion | 1978  
2 funds: \$129,097

Preservation Oklahoma | 2002 \*  
\$39,011

Sillwater Museum Association/  
Sheerar Museum | 2000  
\$17,965

Westerners International | 1988  
\$155,689

### Neighborhood Associations

Capitol View Neighborhood Association | 2002  
\$33,101

Crown Heights-Edgemere Heights  
Neighborhood Association | 1994  
\$229,183

Edgemere Park Preservation Area | 2002  
\$56,404

Historic Brookhaven Neighborhood  
Association | 1992  
\$89,803

Mesta Park Neighborhood Association | 2003  
\$68,785

Neighborhood Alliance of Oklahoma City | 1993 ■  
\$95,273

Oklahoma City Housing Services Redevelopment  
Corp./Positively Paseo | 2001 ■  
\$166,719

Putnam Heights Preservation Area/  
Anderson Family Endowment | 2000  
\$69,170

Shartel Boulevard Development  
Authority | 2003  
\$125,880

## Religious Organizations

4HIM - His Healing Helping Hands  
International Ministries | 2007  
\$39,490

All Souls' Episcopal Church | 2003  
2 funds: \$800,748

LifeChurch.tv | 2005 \*  
\$48,746

St. Paul's Episcopal Cathedral | 2009 \*  
\$42,384

SEARCH - In Search of The Lord's Way | 2010 \*  
\$39,827

Sisterhood of Temple B'nai Israel | 2005 \*  
2 funds: \$69,934

Sisters of Benedict | 2004  
\$18,487

Temple B'nai Israel Centennial Fund | 2003  
\$27,642

## Senior Adult Services Organizations

Areawide Aging Agency | 1992  
\$96,781

Baptist Retirement Center | 1982  
\$147,933

Daily Living Centers | 1978  
\$287,266

Edmond Senior Community Foundation | 2002 ■  
\$80,354

Foundation for Senior Citizens | 1975  
\$57,823

Oklahoma Alliance on Aging | 2008 \* ■  
\$23,801

Oklahoma County Senior  
Nutrition Program | 1992  
\$61,584

Rebuilding Together OKC | 2002 ■  
\$57,817

RSVP - Retired & Senior Volunteer Program  
of Central Oklahoma | 1985 ■  
\$92,610

## Social Services Organizations

Mary Abbott Children's House | 2011 \*  
\$36,110

Aid for Individual Development | 1981  
\$176,437

American Red Cross of Central Oklahoma | 1979 ■  
\$200,410

CARE - Child Abuse Response  
and Evaluation Center | 1982 ■  
\$72,124

CASA of Oklahoma County | 2008 \*  
\$41,424

Catalyst Behavioral Services | 2003  
\$43,504



PHOTO PROVIDED

*By providing training and employment opportunities, Dale Rogers Training Center helps individuals with disabilities gain pride and self-confidence, financial independence and the ability to live fulfilling and productive lives.*

## Dale Rogers Training Center

Named in honor of Dale Evans Rogers, actress and wife of singing cowboy Roy Rogers, the Dale Rogers Training Center was established in 1953 by a group of Oklahoma City parents as a school for children with developmental disabilities. The Rogers' daughter Robin was born with Down syndrome in 1950 and died at the age of two. Mrs. Rogers' poignant book about Robin's life, "Angel Unaware," helped to significantly increase public awareness of individuals with developmental disabilities.

In 1975, the school transitioned into a vocational training and employment center to continue serving individuals who had aged out of the public school system. Today the Dale Rogers Training Center is the largest organization of its kind in Oklahoma and annually trains or employs more than 900 individuals with disabilities at five locations. The center's services include paid vocational training, assessment and placement services, in-house and community employment opportunities and a summer day camp for teenagers and young adults.

Since 1978, the center's Charitable Organization Endowment at the Oklahoma City Community Foundation has helped the organization continue to meet the growing needs of the community. Dale Rogers Training Center executive director Connie Thrash McGoodwin says the annual distributions from their endowment are used to purchase specialized equipment to help the center acquire subcontract employment for individuals with disabilities.

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Catholic Charities of the Archdiocese of Oklahoma City   1988 ■ \$147,928	NAIC - Norman Addiction Information & Counseling   2007 * \$42,898	Urban League of Greater Oklahoma City   1988 \$52,243
Center for Children and Families, Inc.   2009 * ■ \$72,957	Neighbor for Neighbor of Oklahoma City   1973 ■ \$331,622	Urban Mission   1978 ■ \$245,088
Central Oklahoma Association for the Deaf & Hard of Hearing   1987 \$48,808	Neighborhood Services Organization   1982 ■ \$220,958	Willow Springs Boys Ranch   1999 \$44,932
A Chance to Change   1982 ■ \$154,472	NewView Oklahoma   1999 ■ \$160,483	Work Activity Center   1993 ■ \$478,048
Citizens Caring for Children   1988 ■ \$71,582	Oklahoma Baptist Homes for Children   2008 ■ \$194,372	World Neighbors   1971 \$835,199
City Rescue Mission   1999 \$84,832	Oklahoma Foundation for the Disabled   1973 ■ \$219,710	Youth Services for Oklahoma County   1980 ■ \$191,371
Coffee Creek Riding Center   1994 \$34,415	Oklahoma Halfway House   1971 \$138,736	YWCA Oklahoma City   1971 ■ \$115,082
Consumer Credit Counseling Services of Central Oklahoma   1999 ■ \$23,790	Oklahoma Lawyers for Children   2006 \$35,658	<b>Youth-Serving Organizations</b>
Deaconess Home/Pregnancy and Adoption Services   1975 \$153,683	Parent Promise   1993 \$126,064	Big Brothers Big Sisters of Oklahoma   1983 ■ \$155,431
EARC - Employment & Residential Centers   2003 * \$42,214	Peppers Ranch   2006 * ■ \$48,505	Boy Scouts of America - Last Frontier Council   1972 ■ \$759,856
Easter Seals of Oklahoma   1988 ■ \$125,367	Rainbow Fleet   1979 \$117,891	Boys & Girls Club of Oklahoma County   2002 ■ 2 funds: \$387,267
Firststep - OKC Metro Alliance   1992 ■ \$387,372	Regional Food Bank of Oklahoma   1985 ■ \$243,328	Camp Fire USA - Heart of Oklahoma Council   1973 \$246,944
Genesis Project   1983 \$89,137	Reliant Living Centers of Oklahoma   1979 \$44,722	Chesapeake Swim Club   1988 \$197,865
Goodwill Industries of Central Oklahoma   1979 ■ \$686,952	Dale Rogers Training Center   1978 ■ \$307,965	Girl Scouts - Western Oklahoma   1978 ■ 2 funds: \$181,101
Heartline   1986 \$180,945	Safe Kids Oklahoma   2005 ■ \$20,153	Junior Achievement of Greater Oklahoma City   1977 \$145,476
Hope Center of Edmond   2005 * ■ \$46,911	The Salvation Army   1971 2 funds: \$897,749	Oklahoma City Police Athletic League   1994 \$45,957
Infant Crisis Services   1986 ■ \$229,397	Scope Ministries International   1982 \$108,188	Oklahoma FCA   1976 ■ 2 funds: \$314,962
Jesus House   1991 ■ \$190,305	Skyline Urban Ministry   1992 \$281,517	Denny Price Family YMCA of Enid   2006 \$32,572
Legal Aid Services of Oklahoma   1993 ■ 2 funds: \$96,111	SAFY - Specialized Alternatives for Families & Youth   2007 * \$22,718	Salvation Army Boys and Girls Club of Oklahoma City   1991 \$124,341
Limbs for Life Foundation   2009 * ■ \$48,343	Special Olympics Oklahoma   2001 ■ \$24,701	UNITY - United National Indian Tribal Youth   2010 ■ \$19,415
Make-A-Wish Oklahoma   1997 ■ \$114,157	Speck Homes   1974 \$644,811	Whiz Kids/City Care   2007 * \$37,067
Make Promises Happen/ Central Oklahoma Christian Camp   1997 ■ \$88,537	Sunbeam Family Services   1971 ■ \$299,034	YMCA of Greater Oklahoma City   1971 4 funds: \$578,367
McCall's Communities for Life Enrichment   1999 \$523,205	TEEM - The Educational and Employment Ministry   1994 ■ \$198,646	YMCA of Greater Oklahoma City - Camp Classen   1983 2 funds: \$673,909
Meadows Center for Opportunity   1987 \$204,298	United Methodist Boys Ranch   1996 \$56,069	Youth Leadership Exchange   2000 \$54,515
Mental Health Association of Central Oklahoma   1984 ■ \$99,557	United Way of Central Oklahoma   1979 ■ \$263,517	
	Upward Transitions   1983 \$85,613	

# Program Services Benefit Organizations

The Oklahoma City Community Foundation is the community's leading advocate for endowment development and has more than 40 years of experience in effective endowment administration. We have investment, distribution and administrative policies in place that allow for long-term endowment growth. In addition to our administrative oversight of the endowments, we also provide services and resources that add value to the organizations participating in the Charitable Organization Endowment Program. Our goal in offering these services is to provide the charities with the opportunity to strengthen their organizations. For more information on the program, contact Gayle Farley at 405/606-2910 or [g.farley@occf.org](mailto:g.farley@occf.org) or visit [www.occf.org/coeprogram](http://www.occf.org/coeprogram).

## Development, Communications and Training

We help charitable organization staff encourage support for their endowments through a variety of resources including publications and our website. We will work directly with staff and board members to develop a unique strategy to encourage estate gifts to an organization's endowment. In addition, we publish an Annual Report that is distributed to donors, potential donors and community leaders and promotes all organizations participating in the program. Our E News is a monthly electronic newsletter sent to each organization and provides summaries and links to relevant articles and resources as well as includes information on upcoming trainings and grant deadlines.

## Lunch for 2

In partnership with Cole & Reed, P.C., we offer Lunch for 2, a quarterly series of workshops for certified public accountants who work for or with charitable organizations. The workshops are free and provide two hours of continuing education credit for the attendees.



## Charitable Organization Endowment Program Notebooks

A customized Charitable Organization Endowment Program Notebook is provided to each organization and contains historical information on gifts and grants, policies governing the fund, the fund agreement, a copy of the first four custom pages of the fund report and details about services we provide.

## Online Resources @ [www.OCCF.org](http://www.OCCF.org)

Our website offers several features created for the benefit of the charitable organizations:

**Central Oklahoma Charities** is the area's most up-to-date searchable online nonprofit directory. Each charitable organization listing includes contact information for the organization, a description of services, a link to the organization's website and email and a link to our online giving service. For those organizations with a published profile on GiveSmartOKC.org, the Central Oklahoma Charities page provides the contact information and links described above and becomes an online giving form for credit card gifts to that organization's endowment fund.

## DonorCentral: An online reporting service for charitable organizations

Since 2004, the Oklahoma City Community Foundation has provided DonorCentral, a free online fund reporting service that provides a convenient way for organizations to stay informed about their endowment funds. DonorCentral allows an organization representative to review fund balances, gift and annual distribution history and quarterly investment performance. It can be a very useful tool for both reporting to the organization's board and developing donor relationships. DonorCentral is password protected and is only accessible through our website at [www.occf.org](http://www.occf.org). For more information about DonorCentral, please contact Gayle Farley at 405/606-2910 or [g.farley@occf.org](mailto:g.farley@occf.org).

**The Toolkit** provides resources to assist the charitable organizations in promoting and growing their endowment funds. Resources include instructions on how to add links on an organization's website back to giving information at [www.occf.org](http://www.occf.org), archives of past E News issues and links to staff contacts.

Our **secure online giving service** offers donors the ease of using PayPal to make a credit card gift to any of the charitable organization endowments. We are able to accept gifts from MasterCard, Visa, Discover and American Express. When you make a credit card gift, an electronic receipt will be sent to the email address provided in the online form.

**Legacy Giving** is a section of our website devoted to information about estate or planned gifts. The section includes a philanthropic calculator that helps determine the tax and charitable benefits of certain types of gifts. You can learn more by going directly to [www.occflegacy.org](http://www.occflegacy.org). Read more about planned giving on page 15.

## Your Program Contacts



**Gayle Farley**  
Program Officer  
405/606-2910  
[g.farley@occf.org](mailto:g.farley@occf.org)



**Kenneth Conklin**  
Director of Development  
405/606-2926  
[k.conklin@occf.org](mailto:k.conklin@occf.org)

# Our Investment Management Process

A key goal of the Oklahoma City Community Foundation Trustees and our Investment Committee is to achieve good investment returns that allow for annual distributions from endowment funds, help increase the value of the funds and ensure the endowments exist for the future.

While the markets can be volatile, our intent is to have a strong process for allocation and review. We are fortunate to have a committee that is well-informed and actively involved. We have always been transparent about our investment process and the results and we are pleased that our efforts have resulted in a solid investment product for our donors and the charitable organizations.

## Investment Committee

Our Investment Committee comprises six Trustees or past Trustees and three community leaders who are knowledgeable about investments. The members of the Investment Committee for FY2012 are listed on page 11. 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. During 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 performs one of the most important functions that we offer to support donors and charitable endowment funds.

## Investment Consultant

Since 1988, Hotchkiss Associates has served as our investment consulting firm. Jack Marringa is the principal who serves as the direct contact with the committee and our staff. Based in Chicago, Hotchkiss Associates is a division of United Capital Financial Advisors. In addition to monitoring investment performance and making recommendations about asset allocation, Mr. Marringa and the firm assists with the selection of style-specific managers to implement our allocation policy.

## Our Investment Process

Our management process begins with the committee's determination of percentage 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 (see chart on page 12).

Once allocation is determined, the committee selects the style-specific managers. The managers' performance is evaluated against the appropriate benchmark for their particular sector and their adherence to the specific style they have been engaged to manage. For FY2012, we had nine active managers, seven for equities and two for fixed income.

## General Pool Investment

### Active Managers *as of 6/30/2012*

#### Large Capitalization Value

**O'Shaughnessy Asset Management** (Stamford, Conn.) Hired in February 2012 and invests in companies with a market capitalization greater than \$10 billion and that are classified as value stocks.

#### Large Capitalization Core

**Saratoga Research and Investment Firm** (Saratoga, Calif.) Hired in February 2012, the firm's orientation is to high-quality companies at a price that provides an opportunity for appreciation.

#### Small Capitalization Value

**Earnest Partners, LLC** (Atlanta, Ga.) Hired in 2003 and manages value stocks with capitalization of \$2 billion or less.

#### Small/Mid Capitalization Growth

**Columbus Circle Investors** (Stamford, Conn.) Hired in 2001 to manage stocks with a market capitalization of less than \$10 billion that are classified as growth stocks having good prospects for increasing revenue and earnings.

#### Small Capitalization Core

**Kalmar Investments Inc.** (Wilmington, Del.) Hired in 1998, Kalmar's style is described as "growth with value" in the small-capitalization universe and is classified between both growth and value for asset allocation decisions.

#### High Yield Bonds

**Wells Capital Management** (San Francisco, Calif.) Hired in 2009, Wells is a division of Wells Fargo and manages a portfolio of bonds with greater risk and higher yield than normal fixed income securities but still investment grade. The Investment Committee has classified this asset with equities because of the type of risk associated with this asset class.

#### International

**Aberdeen Asset Management** (U.S. headquarters in Philadelphia, Pa.) Hired in 2008, the firm is a global investment management group that provides an active manager component in the emerging markets sector.

#### Fixed Income

Our fixed income investments are managed by **JP Morgan Chase Asset Management** and **BOK Financial**. Both of these institutions have a long history in our community and have worked with the Oklahoma City Community Foundation for many years.

## Index Funds

In addition to these managers who actively select stocks in each of their respective sectors, we also use a group of index funds to provide 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 is BlackRock (New York) (formerly Barclays Global Investors) and the annual costs range from 5 basis points to 35 basis points.

# Maintaining a disciplined approach to investment management

Since our founding in 1969, the Oklahoma City Community Foundation has been central Oklahoma's leading advocate for building endowment funds through not only support from donors but also through sound investment and distribution strategies. 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.

Our investment policy is specifically designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity. 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

Our Investment Committee uses a style-based investor management system and allocates assets to specific investment styles. The committee hires investment managers to manage a particular style. We use nine active managers; seven for equities and two for fixed income investments. Approximately 60 percent of the pooled investments are actively managed.

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 opportunities arise. 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.

While the volatility of the markets in recent years has been a challenge, our 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 used a distribution policy that permits endowments to capitalize on good investment years as well as

## Investment Committee FY2012



**Steven C. Davis \***  
Chairman, Investment Committee  
Attorney, Hartzog  
Conger Cason & Neville



**Stephen Mason \***  
President, Board of Trustees  
Cardinal Engineering

**Steve Agee ■**  
Dean, Meinders School  
of Business

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

**Paul W. Dudman \*\***  
Attorney, Fellers Snider  
Blankenship Baily & Tippens

**Kirkland Hall \***  
Co-Owner, Hall Capital

**James H.  
Holloman Jr. \*\***  
Attorney, Crowe & Dunlevy

**Ed Krei**  
Managing Director,  
The Baker Group

**Scott Mueller**  
CFO, Arcadia Resources

**Bond Payne \* ■**  
Chairman, Heritage Trust

**J. Edward Barth \*\***  
Ex-Officio  
Attorney, Andrew Davis

**Christian K. Keesee \*\***  
Ex-Officio  
Chairman, Kirkpatrick Bank

## Investment Counsel

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

\*FY2012 Trustee    \*\*Past Trustee    ■ Joined committee July 1, 2012

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 12-quarter average of the fund's market value. While there are other approaches to determining distributions, the 5 percent spending rule does not require a specific investment allocation to income-producing assets and is not subject to short-term market fluctuations.

For more information on our investment and distribution policies, please contact Rhonda Godwin at 405/606-2916 or email her at [r.godwin@occf.org](mailto:r.godwin@occf.org).

# Pooled Investments Performance Summary

Manager	% of Total		Rate of Return
	Portfolio	% of Asset Class	Year Ended
	June 30, 2012	June 30, 2012	June 30, 2012
<b>EQUITY</b>			
<b>LARGE CAP VALUE</b>			
<i>O'Shaughnessy Asset Mgmt.</i>	2.87%	4.95%	N/A
<i>BlackRock Russell 1000 Value Index Fund</i>	9.58%	16.54%	1.74%
<i>Russell 1000 Value</i>			3.01%
<b>LARGE CAP GROWTH</b>			
<i>BlackRock Russell 1000 Growth Index Fund</i>	15.05%	25.97%	5.45%
<i>Russell 1000 Growth</i>			5.76%
<b>SMALL/MID CAP VALUE</b>			
<i>Earnest Partners</i>	3.54%	6.11%	-3.14%
<i>Russell 2000 Value</i>			-1.44%
<b>SMALL/MID CAP GROWTH</b>			
<i>Columbus Circle Investors</i>	4.34%	7.49%	-3.50%
<i>Russell 2500 Growth</i>			-3.19%
<b>INTERNATIONAL</b>			
<i>BlackRock EAFE Index Fund</i>	2.86%	4.93%	-13.50%
<i>MSCI EAFE (US\$) Net</i>			-13.83%
<i>BlackRock Emerging Markets Index Fund</i>	0.44%	0.76%	-16.02%
<i>Aberdeen Emerging Markets Fund</i>	5.01%	8.65%	-3.24%
<i>MSCI EMF (Gross) Index</i>			-13.38%
<b>CORE</b>			
<i>BlackRock Russell 1000 Index Fund</i>	7.12%	12.29%	3.85%
<i>Saratoga</i>	2.83%	4.88%	N/A
<i>Russell 1000</i>			3.01%
<i>Kalmar Investments</i>	2.32%	4.01%	-1.66%
<i>BlackRock Russell 2000 Index Fund</i>	0.01%	0.02%	-1.87%
<i>Russell 2000</i>			-2.08%
<b>HIGH YIELD BONDS</b>			
<i>Wells Capital Management Sutter Fund</i>	1.96%	3.38%	4.96%
<i>CSFB High Yield Bond Index</i>			7.30%
<b>TOTAL EQUITIES</b>	<b>57.96%</b>	<b>100.00%</b>	<b>0.30%</b>
<i>S&amp;P500 Stock Index</i>			5.45%
<i>Russell 3000</i>			3.84%
<b>FIXED INCOME</b>			
<i>JPMorgan</i>	19.19%	46.02%	6.21%
<i>Bank of Oklahoma</i>	17.61%	42.23%	5.49%
<i>Barclays 1-3 yr. Bond Fund</i>	2.42%	5.80%	N/A
<i>BlackRock 1-3 yr. Treasury Bond Index Fund</i>	2.48%	5.95%	0.97%
<b>TOTAL FIXED INCOME</b>	<b>41.71%</b>	<b>100.00%</b>	<b>5.70%</b>
<i>Barclays Capital G/C Int. Index</i>			5.42%
<i>Barclays Capital 1-3 Govt</i>			0.86%
<b>CASH</b>			
<i>JPMorgan Money Market Fund</i>	0.34%		0.08%
<b>TOTAL POOLED INVESTMENTS</b>	<b>100.00%</b>		<b>2.31%</b>
<b>Composite Indices</b>			
65% S&P500/35% Barclays Capital G/C Int.			5.44%
50% Russell/15% MSCI/35% Inter			1.63%

Fiscal Year Ended	General Pool Rate of Return	Composite Indices (Note A)	Allocation Benchmark (Note B)
June 30, 2012	2.31%	5.44%	1.63%
June 30, 2011	21.57%	21.26%	21.96%
June 30, 2010	12.99%	12.28%	12.32%
June 30, 2009	-14.61%	-15.20%	-16.09%
June 30, 2008	-3.23%	-5.94%	-4.76%
June 30, 2007	13.68%	15.40%	16.49%
June 30, 2006	6.82%	5.54%	8.90%
June 30, 2005	7.52%	5.76%	8.16%
June 30, 2004	15.03%	12.39%	15.01%
June 30, 2003	5.28%	3.96%	3.48%
<b>Ten Years Compounded (Note A)</b>	<b>6.27%</b>	<b>5.60%</b>	<b>6.17%</b>

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

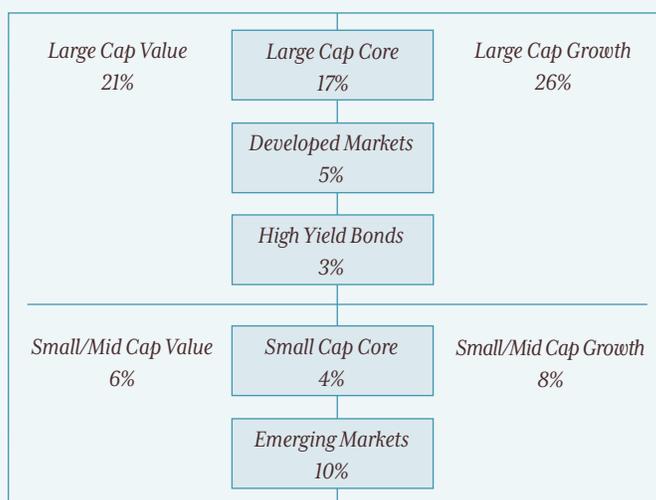
Note B: Equity performance is compared to the Russell 3000 stock index and the MSCI ASWI exUS International equity index; fixed income performance is compared to the Barclays Capital Government/Credit Intermediate bond index (Barclays Capital G/C Int) and total return is compared to a composite of these three indices.

As of Fiscal Year ending June 30, 2012

## Strategic Asset Allocation Model - General Pool

	Target	Range
Equity	65%	40-70%
Fixed Income	35%	30-60%
Cash	0%	0%

## Asset Class Target Percentage Allocation for Equities

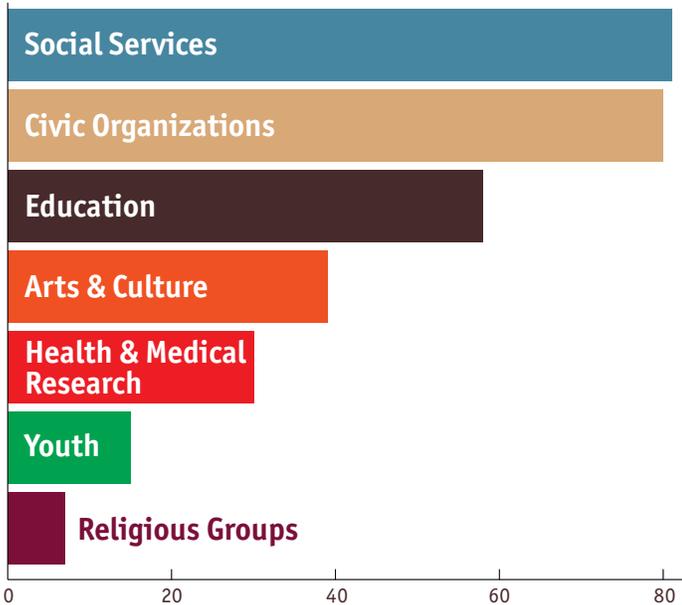


## Target Asset Class Ranges

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

# Number of Endowment Funds by Program Area

The 310 charitable organizations that participate in the Charitable Organization Endowment Program provide a wide variety of services and programs within central Oklahoma. The graph below illustrates the number of these organizations within a service or program area as of June 30, 2012.



# FY2012 Distribution by Program Area

For Fiscal Year 2012, the Oklahoma City Community Foundation will distribute more than \$5.6 million to Charitable Organization Endowment Program participants. The chart below illustrates the distribution flow according to program/service area.

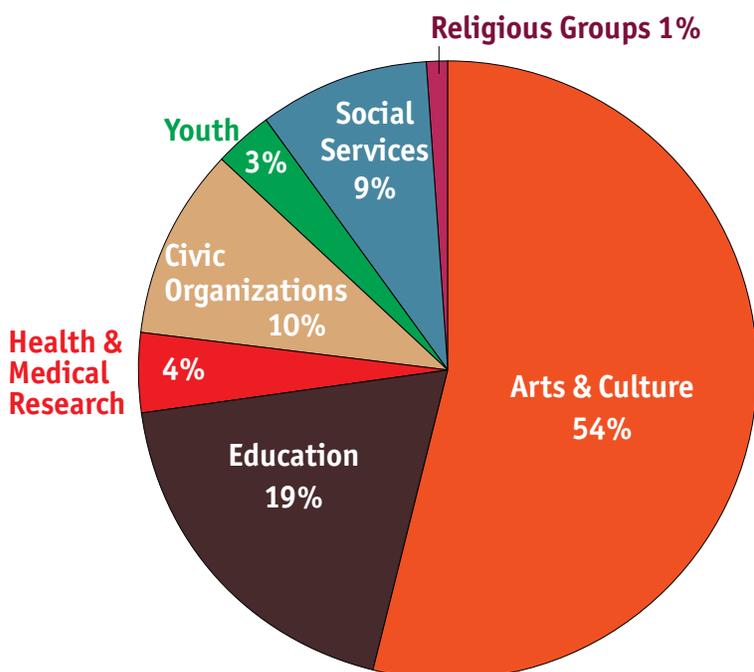


PHOTO PROVIDED

*OK Chorale, a men's barbershop chorus in Oklahoma City, increased its endowment fund by \$10,000 through the 2011 Endowment Match Challenge. The group established its Charitable Organization Endowment at the Oklahoma City Community Foundation in 2002 and the annual distribution from the fund allows the organization to offer its annual Christmas performance for free to the public.*

## Charitable Organization Endowment Match Challenge

During 2011, the Oklahoma City Community Foundation offered a dollar-for-dollar match opportunity to 69

**2011**  
Endowment  
Match Challenge

organizations whose endowment fund balances were less than \$40,000. Each gift made to those endowment funds through Dec. 31 was matched dollar for dollar. Match levels ranged from \$5,000 for those with endowment funds with higher fund balances up to \$10,000 for organizations with endowment funds with balances of \$20,000 or less. At the conclusion of the match, 329 individual gifts from donors helped to increase the endowment funds of 43 nonprofit organizations by \$582,033.

For the Arcadia Historical & Preservation Society, participating in the match resulted in an increase of \$20,000 to its endowment fund, doubling the fund's balance. The nonprofit organization is an all-volunteer group that works to promote the history of the Arcadia community and the preservation of the Round Barn located along historic Route 66 in eastern Oklahoma County. The group not only attracted nearly 30 individual gifts toward the match but they also used proceeds from a community garage sale that netted \$2,000 toward the match.

Viola Davis, who serves as the organization's treasurer, says everyone was on board to meet the match. "Our board members realize that the endowment fund is very beneficial to the organization," she said. "We had board members going around the community collecting items for the garage sale. It was great."

The organizations who participated in the 2011 Endowment Match Challenge are noted with an asterisk on pages 3-8.

# Giving Now to an Endowment

An endowment fund can help a charitable organization sustain its long-term viability within the community and continue to provide needed programs and services. Making a charitable gift to an endowment fund is a convenient way to ensure your favorite charity or charities is in business for the benefit of future generations. The Oklahoma City Community Foundation is a 501(c)(3) public charity so all gifts made to endowment funds we administer receive the maximum tax benefits allowed. And we always provide donors with the proper tax receipts to document their charitable gifts. Below are methods through which you can make a charitable gift to an endowment fund.

**Online Gifts:** We offer a secure online giving service through PayPal that accepts gifts to permanent endowments from donors using an American Express, Discover, MasterCard or Visa credit card. For many donors, online giving is an easy and convenient way to make a charitable gift at any time. To make an online gift, please visit [www.occf.org/onlinegiving](http://www.occf.org/onlinegiving).

**Cash:** Cash is one of the easiest ways to make a charitable contribution. A cash contribution to a charitable organization endowment can be in the form of cash, check, money order or a cashier's check. You can mail a cash contribution to the Oklahoma City Community Foundation, for benefit of (tell us organization's name), P.O. Box 1146, Oklahoma City, OK 73101-1146.

**Real Estate:** Real estate may be given at appraised value. If appreciated, long-term capital gains tax may be avoided on the real estate appreciation if the property is contributed directly to the Oklahoma City Community Foundation for the benefit of a charitable organization endowment. 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.

**Stocks, Bonds and Mutual Funds:** If appreciated, marketable or closely-held securities such as stocks, bonds and mutual funds can offer you significant tax savings while maximizing your 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 long-term capital gains tax. We maintain accounts at most brokerage firms and can arrange for the transfer of the donated securities.

**Oil and Gas Interests & Royalty Interests:** Oil and gas royalty interests may be donated to the Oklahoma City Community Foundation for the benefit of a charitable organization. The contribution of oil and gas interests may allow for the preservation of liquid assets while maximizing the charitable contributions.

**Life Insurance:** Life insurance can be an effective means to fund a charitable gift without significant outlays of cash. Simply designate a charitable organization endowment as the beneficiary.

For more information on our gift acceptance policy, please contact Joe Carter at 405/606-2914 or [j.carter@occf.org](mailto:j.carter@occf.org) or Rhonda Godwin at 405/606-2916 or [r.godwin@occf.org](mailto:r.godwin@occf.org).

## Our Staff is Here to Help

For more information on making a current or planned gift, please contact one of these staff members.



**Nancy Anthony**  
*President*  
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**Joe Carter**  
*Director of Planned Giving*  
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405/606-2912  
[j.stewart@occf.org](mailto:j.stewart@occf.org)

# Giving Later Can Benefit Endowments

Making a planned gift to benefit an endowment fund is an easy and effective giving option. But just what is a “planned gift?” It is a phrase used to describe charitable gifts to nonprofit organizations that derive from an individual’s overall financial and/or estate plan.

At the Oklahoma City Community Foundation, we recognize that planned giving needs vary from donor to donor and that is why we provide the options outlined on this page. If you are considering a planned gift, we encourage you to discuss it with your professional advisor. Below are planned gift options.

## Charitable Gift Annuities

A charitable gift annuity (CGA) provides individuals 55 years or older with not only income for life but also the peace of mind of making a difference through a lasting gift to the community. Through a CGA, you can make a gift with cash or other assets of at least \$20,000, receive income for life and, at the end of the annuity, the remaining assets will go to the charitable fund or funds of your choosing. We offer a variety of CGA options.

## Charitable Remainder Trusts

A charitable remainder trust allows you to place assets in a trust that pays annual income to you or a beneficiary for life or a term of years. You can avoid capital gains tax on the donated assets and also receive an income tax deduction for the fair market value of the remainder interest 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 allows you to transfer assets to us that then pays a percentage of the assets’ value to an endowment you’ve designated. At the end of the trust term, the remaining assets are passed on to designated heirs. Charitable lead trusts offer several advantages including greatly discounted gift or estate taxes and any growth in the assets will be free of these taxes for the heirs. In certain cases, a charitable lead trust 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, you can use any retirement plan asset to maximize charitable contributions by establishing an Advised Fund at the Oklahoma City Community Foundation. Your heirs can serve as advisors to the fund, ensuring that your charitable interests are continued into the future.

## Bequests

With a bequest, you can designate a percentage, the residual or your 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 at [www.occf.org/plannedgivingservices](http://www.occf.org/plannedgivingservices).

## Contact Us

For more information, please contact Joe Carter at 405/606-2914 or [j.carter@occf.org](mailto:j.carter@occf.org).



*Susan Loosen and her three daughters, Fran Loosen, Lisa Loosen Mullen and Sara Loosen Otto*

## A Gift of Life Insurance Assets Creates a Family Legacy

Susan and Mike Loosen were avid supporters of their community of Okarche, Okla. After their deaths, their daughters utilized the assets from a life insurance policy to establish an endowment fund at the Oklahoma City Community Foundation to continue supporting the organizations their family is passionate about.

Originally from Kansas, Susan moved to Okarche after marrying Mike in 1968 and the couple established several businesses in the community. In 1980, Mike succeeded his father as president of the First Bank of Okarche that was founded by the Loosen family in 1892. Following Mike’s death in 1987, Susan assumed the role of president of the bank until her retirement in 2009. Today, the Loosen’s three daughters all serve on the bank’s board of directors and daughter Lisa Loosen Mullen is chairperson of the board.

After Susan’s death in 2010, the Loosen daughters were beneficiaries of her life insurance policy and used the assets to establish the Loosen Family Gift Fund at the Oklahoma City Community Foundation to support the charitable organizations that Susan was passionate about.

“Our parents had always been active in our local community and taught us from early ages about the importance of volunteering time and contributing money to causes we believe in,” says Fran Loosen. “The Loosen Family Gift Fund is a way for our family not only to honor our parents’ legacy, but also to work together to support the communities in which we live.”



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Visit our YouTube channel at [www.youtube.com/occforg](http://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.

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