

Oklahoma City Community Foundation | February 2013

DONOR DIGEST

See the full electronic version at www.occf.org/donordigest. To receive Donor Digest by email, please email editor@occf.org.

2012 Scholarship Match Challenge Results

We are proud to administer the state's largest independent scholarship program. This time of year our scholarship staff is busy processing scholarship applications that will be awarded this spring. In the academic year 2012, the program funded more than \$1.4 million in scholarships and awards to 707 students.



To further strengthen the program's impact, in 2012 we offered a match challenge to the scholarship endowment funds and 75 took us up on the offer. Gifts received between March 31 and Dec. 31 were included in the match and when the last gift was counted, the results were impressive. We received gifts from more than 560 donors that increased the endowments by a total of \$731,177. A special thanks to those of you who made a gift or gifts during the challenge. We have posted the participating endowment funds, number of gifts received and fund balances on our website at www.occf.org/2012match.

The idea of offering match challenges can be credited to our founders, John and Eleanor Kirkpatrick. They understood that challenges not only helped to increase endowment fund balances but also attracted new donors. Many of you may remember and possibly participated in the Kirkpatrick Challenges over the years.

GiveSmartOKC Continues to Grow

If you haven't taken a few moments to check out GiveSmartOKC, I encourage you to do so. We have published profiles for 150 nonprofit organizations and have nearly that many

in the process of completing their profiles. Traffic to the site continues to grow and visitors are staying an average of eight or more minutes. Each profile offers information that you won't find elsewhere online, from governance policies to detailed financial history, its available and free 24/7 at www.givesmartokc.org. Don't find your favorite nonprofits among the published profiles? Encourage them to contact us at givesmartokc@occf.org.

GiveSmartOKC
Know More. Give More.

Estate Planning 1.5 Series

For 2013, we have partnered with Cannon Financial Institute to offer its monthly teleconference series that we are promoting as Estate Planning 1.5. Each month, the series provides an expert speaker who leads a 90-minute discussion on topics such as updates to tax laws and marketplace trends affecting wealth management/estate planning professionals. The series is free and offers continuing education credits for attorneys, trust officers, CPAs and other financial planners. At the January teleconference, more than 60 professionals attended. See the monthly schedule and topics at www.occf.org/estateplanningseries. For more information, contact Joe Carter at 405/606-2914.

Investment Performance

For the calendar year of 2012, our overall investment performance was 11.02%. Investment performance for the first six months of FY2013 was 4.79 percent. To review the details of the most recent investment performance results, please visit our website.

Mary Surbeck Retires

After heading up our LIFE Initiative for the past seven years, Mary Surbeck retired effective Dec. 31, 2012. We are grateful for Mary's efforts on increasing the awareness of literacy needs in our community. Her expertise and tenacity have made a lasting impact. Although Mary has retired, we will continue to seek opportunities to support and promote literacy efforts.



Megan Hornbeek Joins Staff

We are pleased to announce that Megan Hornbeek has joined our staff as coordinator of special projects. Megan is an Edmond native who earned her bachelor's degree at Oklahoma City University and her master's at Boston University. Most recently, Megan worked for the registrar's office at Oklahoma City Community College. You can reach Megan at m.hornbeek@occf.org or 405/606-2917.



IRA Charitable Rollover for 2013

The tax law recently passed by Congress included an extension of the IRA charitable rollover through Dec. 31, 2013. The rollover allows tax-free distributions of up to \$100,000 per taxpayer, per taxable year from an IRA held by individuals age 70 ½ years or older. Find more detailed information about the IRA charitable rollover as well as other provisions of the law that impacts charitable giving at www.occf.org/iracharitablerollover. Questions? Contact Joe Carter at 405/606-2914 or Rhonda Godwin at 405/606-2916.

TV Commercials To Air

Be on the lookout in coming weeks for our television commercials to run on local network and cable channels and our radio spots on several local stations. The three, 30-second commercials feature donors, the impact of the gifts and how the Oklahoma City Community Foundation helped to make it happen. The commercials are part of our awareness campaign to familiarize the general public about how we help donors help the community. If you'd like to view them at any time, visit www.occf.org/commercials.

Workshop held for Guidance Counselors

Since 1998, our Trustee Scholarship Initiative has provided scholarships in central Oklahoma to good students who are good citizens, and we have also provided training for their high school guidance counselors. The program has grown to include 51 high schools in central Oklahoma. Twice a year, the schools' counselors participate in a free, one-day workshop that features presenters who provide the latest on college admissions, financial aid and other related topics. On Jan. 31, more than 60 counselors attended a workshop held at the Intergenerational Computer Center on the campus of Oklahoma City University. In the fall, we will take the counselors on a tour of area college campuses. For more information on the Trustee Scholarship Initiative, contact Rick Fernandez at 405/606-2919.



Lighting It Up

During the recent holiday season, our trees along Broadway Avenue were strung with blue and orange lights as part of the Downtown in December festivities. We were pleased to participate in the lighting spectacle and, as an added bonus, show our support for the Oklahoma City Thunder!

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