



OKLAHOMA CITY COMMUNITY FOUNDATION

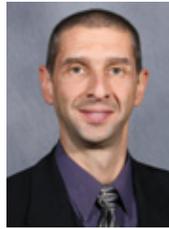
# DONOR DIGEST

**45**  
years  
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The Power of  
Endowment

Autumn 2014

## Tony Tyler Named Chairman of the Board

Effective July 1, Tony Tyler, vice president of Tyler Media, assumed the leadership role for the Oklahoma City Community Foundation's Board of Trustees. He succeeds Steven C. Davis, an attorney with Hartzog, Conger, Cason & Neville, who served as chairman for two years. Mr. Davis remains on the board as a Trustee. In addition, Oklahoma City attorney T. Scott Spradling joined the board of Trustees, replacing Jim C. Clark of B.C. Clark Jewelers who reached the term limit as of June 30, 2014. For a complete list of Trustees, visit [occf.org/trustees](http://occf.org/trustees).



Tony Tyler



T. Scott Spradling

## Orly Genger Exhibition Coming to Campbell Park

The Oklahoma City Community Foundation is pleased to be a presenting sponsor of a monumental art project coming to Campbell Park. A unique rope sculpture constructed of 1.4 million feet of hand-knotted, painted, recycled lobster fishing rope by New York-based artist Orly Genger will be installed in the park located just one block north of our offices on Broadway Avenue. The installation was commissioned by Oklahoma Contemporary, whose future arts center will be located on the east side of the park. The exhibition will open Oct. 20, 2014 and run for one year. We hope the art project will encourage the use of Campbell Park for recreation and wellness activities, a goal of our Parks & Public Space Initiative.



Photo Provided by Oklahoma Contemporary

## Wellness Initiative

In 2014, we launched our Wellness Initiative to promote the integration of physical activity, good nutrition and other healthy lifestyle choices into the daily routines of children and adults living in Oklahoma County. The Wellness Initiative focuses on the following daily numbers to live by – 5210: 5 or more fruits and vegetables, 2 hours or less of screen time, 1 hour of physical activity and 0 sugar sweetened beverages. OK 5210 is also an initiative of the YMCA of Greater Oklahoma City to promote healthy eating and active living in Oklahoma. The Oklahoma City Community Foundation Trustees recently approved a \$25,000 grant to the YMCA to assist in promotion of the 5210 wellness education program. Wellness Initiative grant applications are currently being accepted through Oct. 15. For more information and grant guidelines visit [occf.org/WellnessInitiative](http://occf.org/WellnessInitiative) or contact Sally Ray at [s.ray@occf.org](mailto:s.ray@occf.org).

## New OCCF Staff

We are pleased to welcome the following staff, who filled existing vacancies at OCCF:

In May, Shree Ledford joined our staff to assist accounting with the processing of gifts and grants as well as to provide support for donor services. Shree previously worked at Lakeside Women's Hospital. To welcome Shree, you may reach her at [s.ledford@occf.org](mailto:s.ledford@occf.org) or 405/606-2950.



Shree Ledford

Patricia Zeiler joined our accounting staff in June. Patricia is a certified public accountant and a certified internal auditor and brings 15 years of accounting experience to our organization. You may reach Patricia at [p.zeiler@occf.org](mailto:p.zeiler@occf.org) or 405/606-2924.



Patricia Zeiler

Last month, Helen Stout joined our accounting staff as assistant controller. Helen is a certified public accountant and comes to us from the Arkansas Community



Helen Stout

Foundation in Little Rock where she served as chief financial and operating officer for nine years. Welcome Helen at [h.stout@occf.org](mailto:h.stout@occf.org) or 405/606-2921.

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## Parks & Public Space Initiative / Margaret Annis Boys Trust

In 2014, we announced a new Parks & Public Space Initiative to support the development of parks to meet the health and recreational needs of citizens in Oklahoma County. Together with the Margaret Annis Boys Trust, these two programs provide funding and expertise to improve parks, trails and public lands in central Oklahoma. In August, Oklahoma City Community Foundation Trustees approved the following grants to be awarded from these two programs:

- Jefferson Park Neighborhood/Sparrow Park - \$9,000 to plant trees and crapemyrtles in Sparrow Park.
- John Marshall High School - \$6,000 for the planting of trees and crapemyrtles on campus.
- Fields and Futures/Greater Oklahoma City Youth Association - \$24,000 to help install a walking track and plant crapemyrtles at Webster Middle School in south Oklahoma City.
- Gatewood Elementary School - \$16,000 to install soccer goals and plant trees at the school and neighborhood park.
- Oklahoma City Boathouse Foundation - \$15,000 to support landscape improvements and the development of a boardwalk at the Lake Overholser Boathouse.

The next grant deadline for the Margaret Annis Boys Trust is Oct. 15. The next Parks & Public Spaces Initiative grant deadline is Jan. 15, 2015. For more information and grant deadlines, visit [occf.org/grantprograms](http://occf.org/grantprograms) or contact Sally Ray at [s.ray@occf.org](mailto:s.ray@occf.org) or Brian Dougherty at [b.dougherty@occf.org](mailto:b.dougherty@occf.org).

## FY2014 Investment Performance

For the fiscal year ending 2014, the investment performance total return for our pooled investments was 14.56 percent. Capital preservation, protection against inflation and long-term growth are the fundamental objectives of our investment strategy. In August, we welcomed more than 80 attendees to our Investment Performance Luncheon to share these results and to hear from representatives from one of our investment managers. Pat Malcom and Chris Hovis with Earnest Partners, LLC discussed their firm's approach to small cap investing. Learn more about our investment management process at [occf.org/InvestmentManagement](http://occf.org/InvestmentManagement).



Pat Malcom, Bond Payne, Nancy Anthony and Chris Hovis.

## Charitable Organization Endowment Program

In October, we will begin distributing \$7 million to more than 320 nonprofit organizations in our Charitable Organization Endowment program, which has a collective market value of more than \$169 million as of June 30, 2014. Effective July 1, 2014, the minimum gift to establish a Charitable Organization Endowment fund increased from \$20,000 to \$40,000. Organizations seeking to establish a new fund will be allowed three years to reach the minimum amount, with no distributions allowed from the fund until reaching \$40,000. Existing funds with a balance of less than \$40,000 prior to July 1, 2014, are exempt from the requirement but are encouraged to increase their fund balance to the new minimum amount. In addition, the Kirkpatrick Family Fund will increase its matching grant opportunity for new funds to \$15,000 for \$25,000. Learn more about our Charitable Organization Endowment Program at [occf.org/CharitableOrganizationEndowmentProgram](http://occf.org/CharitableOrganizationEndowmentProgram).

## GiveSmartOKC

Have you checked out GiveSmartOKC.org's new look? In July, we launched an updated version of the website with improved features including responsive web design, more accessible search function, ability to view an alphabetical list of all published nonprofit profiles and much more! GiveSmartOKC currently features publicly-viewable data on 244 nonprofit organizations in central Oklahoma.

To learn how GiveSmartOKC can help you know more about the charitable organizations to whom you give, visit [www.GiveSmartOKC.org](http://www.GiveSmartOKC.org). Click on FIND in the blue navigation ribbon, then select VIEW ALL NONPROFITS from the dropdown menu. Don't find your favorite nonprofit on the list? Encourage them to contact us at [givesmartokc@occf.org](mailto:givesmartokc@occf.org) to request an online profile.

## Estate Planning 1.5

The Estate Planning 1.5 series that features monthly teleconferences from the Cannon Financial Institute continues to be a popular event drawing an average of 60 attendees each month. The free luncheon at the Oklahoma City Community Foundation is offered for 1.5 hours of continuing education credit for attorneys, financial planners, trust officers and CPAs on topics of estate planning and wealth management. For more information about the final four teleconferences scheduled in 2014 including dates, topics and registration information, visit [occf.org/CEopportunities](http://occf.org/CEopportunities).

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