PLANNING FOR

A BRIGHTER FUTURE

2022 CHARITABLE ORGANIZATION ENDOWMENT REVIEW
Endowments at a Glance

Each year, participating charitable organizations receive a cash distribution equal to 5% of their charitable organization endowment fund’s average market value for the previous 12 quarters. Here’s a look at our progress between July 1, 2021 and June 30, 2022.

Making it Count

32 New Endowments
23M Total Gifts Received

Impact

$11.7 Million Distributed

$1.4M Distribution Increase (+13%) over 2021

370+ Organizations

$3.2M Matched Funds by Kirkpatrick Family Fund

Supporting

45% Arts & Culture
24% Education
12% Social Services
6% Youth-Serving
5% Health-Related
3% Environmental & Animal

2% Community Development
1% Religious
1% History & Preservation
0.6% Veteran Support
0.4% Senior Adult Service

How Can We Help?

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From the COE Program Director —

When we look back over another exceptional year for our Charitable Organization Endowment Program, it is gratifying to see so much support for the future of central Oklahoma nonprofits. Gifts large and small, more than $23 million, were received into our COE funds in FY22, held exclusively for the benefit of our agency partners.

I see a bright future for the funds, for these organizations, and for our community as development professionals continue to promote endowment as a creative giving vehicle for loyal donors, and as strategic donors gravitate toward choosing to give in a sustainable, intentional way. From our oldest funds, dating back 50 years, to our newest funds just getting started, endowment is a powerful tool for building lasting support for nonprofits in central Oklahoma. Gifts to endowments are truly forever gifts.

Jennifer Meckling
COE Program Director

Message from the President & CEO —

Our nonprofits work each day to support our community and help each of us reach a brighter future. As the President and CEO of the Oklahoma City Community Foundation, it is very exciting to see the tremendous opportunity the Charitable Organization Endowment Program creates for so many nonprofits across our community. I look forward to the Community Foundation doing our part to continue this significant support of those working across Oklahoma City and beyond.

Trisha Finnegan
President & CEO

The COE Program

The Charitable Organization Endowment program, one of the first efforts at the Oklahoma City Community Foundation, is one of the largest in the nation. In 1970, Jasper Ackerman established the first endowment fund at the Community Foundation to benefit the National Cowboy and Western Heritage Museum. Today, the program has 388 charitable organizations, many with multiple funds.

Saving for the Future

Whether established through the intentional investment of a board of directors, through a major gift from a single donor, or a public campaign including many small gifts, each endowment fund creates reliable annual funding for a nonprofit. Every year, the organization will receive a check for 5% of the value of the fund, averaged over 12 quarters. The endowment can receive additional gifts and will grow through positive investment gains over and above the annual distribution. In time, total distributions will surpass the original gifts into the fund.

The COE Committee

Ed Krei, Chair
Liz Charles
Brenda Granger
Debby Hampton
Shelley Sanders
Beth Shortt
Staff liaisons:
Joe Carter
Trisha Finnegan
Jennifer Meckling
Rebecca Parks

occf.org/coegift
2022 Charitable Organization Endowment Review
Why Give to Endowment?

Growth over 20 years

A gift to endowment is a gift that lasts forever. Here is a breakdown of how a gift given three different ways can impact your favorite nonprofit. Each represents a total gift of $10,000.

Our Investment Strategy

How are endowment funds invested?

- All endowment funds at the Oklahoma City Community Foundation are pooled together so funds of all sizes benefit from investment performance.
- Funds are invested by both active managers and index funds to add value while keeping costs low.
- Allocation decisions, investment portfolios and performance are reviewed quarterly by our volunteer Investment Committee. This group consists of Trustees, former Trustees and community leaders with strong investment expertise as well as our Investment Counsel, Goldman Sachs Personal Financial Management.

When investing, we have four main objectives:

1. Preserve capital
2. Protect distribution amounts from inflation
3. Ensure annual distributions continue in perpetuity
4. Generate investment returns in the top third of professionally-managed funds

See our latest performance at: occf.org/investment
How We Help Others

Our Charitable Organization Endowment Program is one of the largest of its kind in the nation not only because of the number of organizations, but also because for five decades, we have worked with organizations to educate them and their donors on the value of an endowment.

Upcoming Workshops: training.occf.org
Exclusively for our nonprofit partners with endowments.

Building a Base for Family Love

For more than 35 years, the Center of Family Love has worked to provide quality lifetime care to individuals with intellectual and physical disabilities. From the very beginning, the Wittrock family has been there to help. Having raised a daughter with disabilities, Harold and Carolyn Wittrock knew the challenge of finding appropriate care and wanted to do their part to make a difference. Over the past four decades, they have poured their time, talents and donations into ensuring Center of Family Love can meet the needs of their clients while keeping an eye to the future.

In 2017, the Wittrock family established a charitable organization endowment fund at the Community Foundation to help ensure the future sustainability of the organization. Through their continued support, and strategic leveraging of Kirkpatrick Family Fund matching grants, they are cementing their legacy for a cause they care about and providing a base for Center of Family Love that will live on well beyond their years.

Creating a Place for the Arts

In the 1970s, John and Joy Reed Belt helped form the Paseo Arts Association to revitalize Oklahoma City’s eclectic arts district. Today, the Paseo has become a thriving arts community visited daily by people all across the metro.

To preserve the integrity of their vision, in 1992, the Belts established an endowment with the Oklahoma City Community Foundation. According to Joy, “Our goal was to make sure the mission would continue to provide space so artists would always have a place to show their work.”

To carry out this vision, the organization’s board of directors has shown a renewed dedication to growing their fund by directing gifts to their endowment and leveraging Kirkpatrick Family Fund matching grants. “We hope to eventually grow the endowment to $1 million,” said Amanda Bleakley, executive director of the Paseo Arts Association. “I’m confident we will be able to use the 5% disbursement each year to ensure the Belt’s original vision for the Paseo will last forever.”

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“I flew helicopters in combat missions. That job was tough. Doing this job is even tougher,” said Jon Foti, executive director of the Dale K. Graham Veterans Foundation, as he walked through their Norman office. He was multi-tasking at that time – giving a tour, talking to donors about their mission and preparing to assist a veteran who had traveled from out-of-state to get help filing his disability claims with the U.S. Department of Veterans Affairs.

The Dale K. Graham Veterans Foundation is a one-of-a-kind program that meets the needs of a severely underserved population – disabled veterans. One of the only programs like it in the country, they assist veterans filing for their pension and other benefits. There is no charge for this important service. Founder and Vietnam Veteran Dale Graham says he modeled this approach after seeing several fellow veterans facing the same hurdles in receiving the benefits they were entitled.

“All these veterans need is someone to really listen to them, and to help them,” Mr. Graham said. “Honestly, it takes someone caring enough about veterans to find individual solutions for each person that needs our help, and it works!”

This bustling facility with 14 staff members and 130 highly-trained volunteers serves veterans from all 50 states and several foreign countries. Each week, more than 300 veterans seek help from this unique organization, and once they get help, they often pay it forward by donating to the organization so other veterans can be helped in the future.

“We are committed to making sure every veteran and their families get the benefits they need and deserve,” Foti said. “We use an evidence-based approach, because that attention to detail is needed in this system. We are proud to say we have a 96% success rate.”

In the past, the Dale K. Graham Veterans Foundation operated solely on donations, but in 2021, their leadership decided to change their funding strategy and started an endowment at the Oklahoma City Community Foundation. Their first step – reach out to thousands of veterans the Dale Graham Veterans Foundation has helped over the years. It worked. The campaign brought in more than 100 individual gifts ranging from $25 to $2,000. With these gifts, they then leveraged a matching grant from the Kirkpatrick Family Fund to establish the fund. Through the process, they also had the opportunity to reconnect with many veterans, receiving several cards and letters expressing sincere gratitude to the Dale Graham staff for help navigating a stringent and very complicated system. They give back by donating to the Foundation so other veterans get the help they need. One note received with a donation said “You and your foundation have changed my life. I cannot thank you enough. I love making my annual donation.”

Veterans in Oklahoma

<table>
<thead>
<tr>
<th>War</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>40%</td>
</tr>
<tr>
<td>Gulf War, post-2011</td>
<td>26%</td>
</tr>
<tr>
<td>Gulf War</td>
<td>24%</td>
</tr>
<tr>
<td>Korean War</td>
<td>7%</td>
</tr>
<tr>
<td>WWII</td>
<td>3%</td>
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</tbody>
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Volunteers and staff at the Dale K. Graham Veterans Foundation help veterans file their disability claims to maximize the benefits they receive. Norman, OK
In 1979, ten years after founding the Oklahoma City Community Foundation, John Kirkpatrick offered the first challenge match to 61 charitable organizations to engage a broad base of donors to support and help grow their endowment funds. This innovative approach raised nearly $740,000 from 170 individual donors.

Today, more than forty years since the first challenge, this model program continues to empower donors to support more than 370 organizations totaling an investment of more than $35 million.

In a typical year, more than 30 organizations will rise to the challenge of an endowment matching grant, setting their own goal and leveraging the match to invest in their future. The staff at OCCF provide resources and technical assistance and promote the matches to current donors and the public.

My grandfather’s matching approach revolutionized the way charitable organizations raise donations in the modern age—attracting new donors and partners all seeking to create sustainable long-term growth for organizations across all sectors.”
New Charitable Organization Endowments

**Bridges of Norman**

Founded as Independent Living Services for Youth in the mid-90s, the organization addresses the issue of homelessness, specifically for teens who are alone because of some sort of family crisis. They assist independently-living high school students with sliding-scale rent, mentoring, case management, trauma counseling and connection to other social services so they can successfully graduate high school and break the chain of poverty. In 2020, they established a fund at the Community Foundation in memory of volunteer Elizabeth Hedrick, which they built upon last year with an endowment gift from the Kirkpatrick Family Fund.

**Boys and Girls Club of Oklahoma County**

Since 1995, the Boys and Girls Club of Oklahoma County has been at the forefront of youth development, working with youth from disadvantaged economic, social and family circumstances throughout Oklahoma City. Through their activities and programs, they encourage youth to be productive, responsible and caring citizens and leaders. In 2002, they established an endowment fund at the Oklahoma City Community Foundation, which the Kirkpatrick Family Fund expanded upon in 2022 when they established a designated fund in honor of former Oklahoma City Community Foundation president Nancy Anthony.

- **Boys & Girls Club of Oklahoma – Nancy B. Anthony Fund**

**Catholic Charities of the Archdiocese of Oklahoma City**

Associated with the Archdiocese of Oklahoma City, Catholic Charities was founded in 1912 with the opening of St. Joseph’s Orphanage. Today, they provide a variety of social services to at-risk individuals in central and western Oklahoma including disaster relief, counseling, residential assistance, adoption and pregnancy programs and immigration legal services. In 1988, they established an endowment fund at the Community Foundation to provide perpetual support for their mission. Last year, a generous donor established a designated fund so they can continue impacting lives in Oklahoma City in perpetuity.

- **Catholic Charities of the Archdiocese of Oklahoma City – Kirkpatrick Fund**

**Cristo Rey of OKC**

As a member of the Cristo Rey Network, Cristo Rey OKC integrates four years of professional work experience into four years of rigorous college preparatory academics. Through this powerful and innovative approach to education, the school strives to provide a quality education for students of limited economic resources to help them become men and women of faith, knowledge, purpose and service. In 2002, they not only established an endowment fund at the Community Foundation, but they also celebrated their first graduating class of seniors.

**Dale K. Graham Veterans Foundation**

After being discharged from the U.S. Marine Corps, Dale Graham began volunteering with the U.S. Department of Veterans Affairs where he learned the ins and outs of veteran benefits procedures. In the early 90s, he took these skills and began encouraging and helping veterans file their benefits claims. Today, the Dale K. Graham Veterans Foundation remains committed to making sure every veteran and surviving spouse receives the benefits and pensions they’ve earned to protect their future. The organization specializes in navigating the often frustrating and difficult claims process, helping veterans achieve independence and self-reliance. In 2021, with the help of a Kirkpatrick Family Fund matching grant, they established an endowment at the Community Foundation to fund their work in perpetuity.

**Edmond Mobile Meals**

Their first day of service, Edmond Mobile Meals delivered six noontime meals. Today, with a team of more than 400 volunteers, they deliver meals and provide social contact to an average of 215 homebound elderly and disabled individuals in Edmond, Oklahoma, who are unable to prepare meals for themselves. To ensure they can continue serving the growing elderly population in Edmond, they established a charitable organization endowment fund in 2012. In 2021, they expanded this with the addition of the Terri Lee Horton Memorial Fund, a designated fund established in memory of Edmond Mobile Meals Assistant Director Terri Horton to honor her legacy of kindness and compassion. The designated fund continues to receive contributions from the public and the board will annually determine the use of the distribution to honor Ms. Horton.

- **Terri Lee Horton Memorial Fund**

**Edmond Public Schools Foundation**

Created in the early 80s to support academic projects and teacher grants in the Edmond Public School District, the Edmond Public Schools Foundation was one of the first education foundations in the state of Oklahoma. Since inception, the foundation has provided millions of dollars in direct support for the district, funding new technology, classroom curriculum, software, hardware, teaching ages, scholarships and more. In 1989, they established an endowment fund at the Community Foundation, which they have expanded on several times over the years, most recently, in 2021 with a designated fund to support a new scholarship.

- **Blake Burgess Winning 10 Scholarship Fund**

**El Reno Public School Foundation**

Since 1988, the El Reno Public School Foundation has worked to enrich the educational environment for their students and teachers through school and classroom grants, scholarships and other educational opportunities. In 2006, with a generous donor gift, they established an endowment fund at the Oklahoma City Community Foundation. Over the past few years, this fund has grown rapidly, adding several designated funds, particularly to support student scholarships. In 2022, they established three new scholarship funds for graduates of the El Reno Public School District located in Canadian County.

- **Delano-Laird Scholarship Fund**
- **Neathery Family Scholarship Fund**
- **Dr. Kent Carder Memorial Scholarship Fund**
El Sistema Oklahoma

Every day after school, Oklahoma City Public Schools students attend El Sistema Oklahoma’s free world-class music education program. They immerse themselves in rehearsals and music classes, homework, snacks and socialization, building friendships and mentorships that support the students and their families as a whole. In 2021, El Sistema established an endowment fund at the Community Foundation to ensure the program can continue to provide students with a safe place to learn and grow. In 2021, a gift from the Schwartz family established a designated fund to support the acquisition, maintenance and preservation of instruments.

- Schwartz Family (S. Elizabeth, Dr. M.J., Dr. Elliott R., Pam and Annie) Instrument Acquisitions and Preservation Fund

Farzaneh Family Cyrus of Persia Scholarship Endowment Fund

In 2021, the Farzaneh family – founders of Home Creations, one of the largest homebuilding companies in Oklahoma – joined with the Oklahoma City Community Foundation and Northeastern Illinois University to create the Cyrus of the Persia Scholarship. This endowed fund provides a scholarship intended to cover the expenses of tuition, fees and books for a maximum of four academic years for promising students seeking a first-class education at Northeastern without the worries of educational attainment causing a financial burden.

Girl Scouts - Western Oklahoma

Since 1939, Girl Scouts - Western Oklahoma has helped girls build courage, confidence and character to make the world a better place. Through their programs, girls ages 5 through 17 in central and western Oklahoma develop leadership skills, financial literacy, healthy relationships, STEM (science, technology, engineering and math) and outdoor skills. In 1978, they established an endowment fund at the Oklahoma City Community Foundation to help them continue this work in perpetuity. In 2022, they established a designated fund to support programs and scholarships for Camp Trivera, an immersive outdoor camp in the heart of Oklahoma City.

- Camp Trivera Programs Fund

In Search of The Lord’s Way

Founded in 1980 by preacher Mack Lyon in Ada, Oklahoma, In Search of The Lord’s Way began as a way to reach more people in western Oklahoma, but as requests for materials increased, it became necessary to move to a larger church. After moving to the Edmond Church of Christ, the program grew exponentially, reaching audiences in Mexico, Belize, India, South Korea, Africa and more. In 2010, they established an endowment fund at the Community Foundation to ensure their work continues in perpetuity. In 2021, they expanded this support with the Joanita Lawrence designated fund, created by the residue of a charitable gift annuity.

- Joanita Lawrence Fund

Lilyfield

Starting as a private adoption agency in Edmond, Oklahoma, Lilyfield worked to meet the most pressing needs among children and families throughout Oklahoma. Today, the organization provides foster care for children and youth in state custody; counseling for children and families impacted by foster care, adoption, or trauma; and comprehensive social services to vulnerable families at risk for involvement with the child welfare system. In 2022, with the help of a Kirkpatrick Family Fund matching grant, they established an endowment fund at the Community Foundation so they can continue to impact the lives of children in perpetuity.

Longhorn Football Team One

In 2007, while celebrating the 50th anniversary of the Jones High School football team, Jones Longhorn Team One kicked off, providing practical and financial assistance to the Jones High School “Longhorns” as they navigate the college application process. Alumni came together in 2020 to begin raising money for an endowment fund at the Community Foundation, and in 2022, with the help of a Kirkpatrick Family Fund matching grant, they established their fund to ensure their support continues in perpetuity.

Mobile Meals of El Reno

For more than 45 years, El Reno Mobile Meals has fostered the nutritional well-being and self-reliance of their clients through the delivery of well-balanced meals for shut-ins, disabled, elderly, convalescing or chronically ill. In 2021, they launched a campaign for their future sustainability with the establishment a charitable organization endowment fund at the Community Foundation. In 2022, with the support of many donors and a matching grant from the Kirkpatrick Family Fund, their vision came to fruition.

Oklahoma Arts Institute

The Oklahoma Arts Institute was established in 1977 to provide fine arts training to Oklahoma’s talented high school students. Each summer, they enlist nationally-renowned literary, visual and performing artists to teach a multidisciplinary fine arts program for nearly 300 young Oklahoma artists. Each fall, they also provide a series of weekend workshops for adults in the visual, literary and performing arts at the Quartz Mountain Arts and Conference Center in southwest Oklahoma. In 1978, they established an endowment fund at the Community Foundation to support their organization in perpetuity. In 2021, a gift from the Schwartz family established a designated fund to support economically challenged student expenses associated with attending camps and programs.

- Schwartz Family (S. Elizabeth, Dr. M.J., Dr. Elliott R., Pam and Annie) Angel Fund

Oklahoma Baptist Homes for Children

An affiliate of the Baptist General Convention of Oklahoma, Oklahoma Baptist Homes for Children is the largest provider of private, non-profit residential child care facility in the state operating four campuses throughout Oklahoma. In addition, the group offers family support and resources, pregnancy centers, adoption and foster care services. In 2008, they established a charitable organization endowment fund at the Community Foundation to continue their work in perpetuity. In 2021, this support was expanded with a designated fund established by the Brannan family.

- Brannan Family of Chickasha, Oklahoma (Toy, Audie, Betty Jean and Jo Ann) Legacy Fund

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Oklahoma Energy Trails Foundation

Formed by members of the Oklahoma Association of Electric Cooperatives, Oklahoma Energy Trails Foundation supports international electric utility infrastructure projects in developing countries. To date, the organization, and Oklahoma linemen, have provided electricity to hundreds of families in Bolivia and Guatemala, impacting thousands of lives and enabling a higher quality of life with better health and sanitary conditions, enhanced safety and economic growth. In 2018, they established an endowment fund at the Community Foundation to support their work in perpetuity. Through a matching grant from the Paul M. Milburn Foundation, they expanded upon this support in 2021 with a new designated fund.

- Oklahoma Energy Trails Foundation – Milburn Fund

Oklahoma FFA Foundation

Since 1985, the Oklahoma FFA Foundation has made its mission to seek out and provide a stable source of funding for the Oklahoma FFA Association and ensure the growth and prosperity of agricultural education in the state. In addition, the foundation supports scholarships and programs to strengthen agricultural education and the National FFA Organization to help students develop their potential for personal growth, career success and leadership. In 2000, they established an endowment fund at the Community Foundation to support the activities of their hundreds of chapters and thousands of members across the state. This support was expanded in 2022 when Wes and Lou Watkins established a designated fund for the organization.

- Wes and Lou Watkins Making Things Better Fund

Oklahoma Foundation for the Disabled

Founded in 1960, the Oklahoma Foundation for the Disabled is a licensed adult day care for persons with disabilities based in Oklahoma City. Through their activity-oriented, day health services and Thursday evening Foundation FunNight!, they impact their clients' lives and offer respite to caregivers on a daily basis. In 1973, they established a charitable organization endowment fund at the Community Foundation to ensure their work continues in perpetuity. In 2021, Kathleen Kaufman established a designated fund for the organization in honor of her mother, Lois Jetta Miller, who was one of the foundation’s co-founders, and her sister, Phyllis Corean Davis, who was one of the foundation’s first clients. The fund supports programming activities that involve creative movement.

- Lois Jetta Miller and Phyllis Corean Davis Creative Expressions Fund

Oklahoma Society Daughters of the American Revolution

Affiliated with the National Society Daughters of the American Revolution, the Oklahoma Society supports programs throughout the state that promote historic preservation, education and patriotism, and offer scholarships for students. Beginning in 2013, they established a series of charitable organization endowment funds and designated funds supporting their work in several different communities around the state. In 2021, they established a new designated fund supporting their Tulsa Chapter.

- Tulsa Chapter Endowment

Oklahoma State University Foundation

Since 1961, the OSU Foundation has been designated as the University’s official fundraising agency, managing donor dollars to provide scholarships, community programs and more. Over the years, several endowment funds have been established at the Community Foundation to support educational opportunities for students, faculty, staff, alumni and friends of OSU. In 2021, the OSU Paul Milburn Tutoring Center designated fund was established to support tutoring services for at-risk students.

- OSU Paul Milburn Tutoring Center Fund

Redlands Community College

Redlands Community College provides a learner-centered environment committed to academic excellence strengthened through service and civic engagement. Since 2000, several charitable organization endowment funds and designated funds have been established to support general operations and scholarships at the two-year public higher education institution located in El Reno, Oklahoma. In 2021, the Austin family established a designated fund for a scholarship for Redlands’ students.

- Austin Family Endowed Scholarship

United Way of Central Oklahoma

The United Way of Central Oklahoma partners with social service agencies in central Oklahoma to help improve the lives of citizens in need. The organization coordinates workplace campaigns and annual fundraising drives to connect community resources to nonprofit organizations in the following focus areas: strong families, successful children, healthy citizens, independent living and community preparedness. The organization established an endowment fund at the Community Foundation in 1979. In 2021, in honor of their 100th anniversary, they began a campaign designed to significantly grow their endowment fund, and in a matter of months, they had established three new designated funds to support a variety of areas.

- 100th Anniversary Fund
- Doug Stussi Financial Stewardship Fund – Established by the Love Family
- Wharton Family Mental Health Fund – Established by the Love Family

Vian Community Foundation

Nestled in the hills of eastern Oklahoma, Vian is home to some of the best nature has to offer. In 1999, a group of residents came together to form the Vian Community Foundation to encourage economic development, build and maintain facilities and assist with programs that enhance education, enrich the culture, encourage the arts and promote the well-being and physical fitness of all members of the Vian, Oklahoma, community. In 2022, they established a charitable organization endowment fund at the Oklahoma City Community Foundation, ensuring lasting community support.

Westview Boys Home

Located near Hollis, Oklahoma, Westview Boys Home provides residential care on a 1,500-acre working ranch for boys ages 12-18 who are experiencing at-risk circumstances. After aging out of the program, Westview continues to work with the young men providing transitional experiences that empower them to more gradually make the change to an independent lifestyle. In 2017, they established a charitable organization endowment fund to continue their work in perpetuity. This was expanded in 2021 with a matching gift from the Paul M. Milburn Foundation that established a designated fund supporting the organization.

- Milburn Endowment Fund
Information at your Fingertips

When the Oklahoma City Community Foundation launched GiveSmartOKC in 2011, it was to provide donors with an online research tool to help them make informed choices about their charitable giving. Over the past decade, GiveSmartOKC has become an incredible community asset with local data from the census and Oklahoma City-County Health Department to help users better understand our community’s needs. We sat down with Community Foundation Trustee Ed Krei to learn how he uses GiveSmartOKC and why he thinks others should do the same.

Q: How do you personally use GiveSmartOKC?
A: Last year, I had some unspent money in my donor advised fund at the Community Foundation, so I used GiveSmartOKC to research and identify an organization that supports adult literacy. I also used it as a research tool when I was looking for an organization to fulfill my qualified charitable distribution from my IRA.

Q: What GiveSmartOKC features have been most useful to you?
A: When I’m assessing a nonprofit, I look for four things.
1. First, I want to see transparency, and having that entry on the GiveSmartOKC platform tells me they want to be a transparent organization.
2. The second most important thing to me is governance. Do they have a strong outside board of governors and do those leaders support the organization?
3. Third, I would say strong management and leadership. Does there seem to be tenure in the organization or have they seen high turnover?
4. Lastly, I look for discipline and stewardship of the resources. Just by participating and completing their GiveSmartOKC profile, it demonstrates that for me.

Q: What then drives you to take action and donate?
A: I would say really if they can get to that last step and are good stewards of the funds they receive and are fulfilling their organization’s stated mission, that helps me decide.

Q: Have you used the community data to research charitable organizations?
A: I sit on some bank boards, and they have community giving programs that are not quite as focused on singular issues. I’ve encouraged them to use it, and it has really helped them more effectively target the needs in our local community and direct those funds.

GiveSmartOKC Manager Rebecca Parks and COE Program Director Jennifer Meckling explore updates that make GiveSmartOKC an even more powerful tool.

In 2020, GiveSmartOKC underwent a major upgrade, allowing donors to efficiently analyze organizations, and take their philanthropy to the next level. With easy-to-find donate buttons on each profile, they now have the opportunity to support the sustainability of an organization by giving directly to their endowment fund, or donate to the organization itself. See how you can transform your giving at GiveSmartOKC.org!

“GiveSmartOKC is a terrific resource for anyone considering giving or serving as a volunteer or board member.”

Ed Krei
Bank Consultant & OCCF Trustee

In 2021, GiveSmartOKC...
The Parkinson's Foundation of Oklahoma began in 2004 with the mission to inspire hope and transform life for Parkinson’s patients and their families in Oklahoma. Fast forward to 2022, approximately 10,000 people across Oklahoma have been diagnosed with Parkinson’s disease, and 3,500 of them live within the Oklahoma City metro area.

Now with a new name – Oklahoma Parkinson’s Alliance - and through partnerships with hospitals and therapists, the organization offers group and one-on-one sessions for their patients. One of their most successful and well-attended sessions is the second part of their speech therapy program known as The LOUD Crowd.

“Most people diagnosed with Parkinson’s disease are in their early 60s, and nearly 90% of patients develop issues with swallowing properly and their voice volume is reduced,” said Bruce McIntyre, Oklahoma Parkinson’s Alliance executive director.

In the first part of the Alliance’s speech program, patients participate in four weeks of individual speech therapy where they learn to strengthen their speech and swallowing mechanisms. But, since Parkinson’s is a progressive condition, maintaining these abilities is an ongoing challenge – enter The LOUD Crowd. This program brings patients together to practice voice movements that exercise their throats, helping them to maintain their improved speaking abilities for years. With early intervention and continued work like their speech therapy program, patients improve their chance of living and maintaining a normal life by up to 95%.

In 2020, the Oklahoma Parkinson’s Alliance board of directors took bold action and established a Charitable Organization Endowment Fund with the Oklahoma City Community Foundation to ensure they stay focused on delivering services to their patients. “People need to have access to the services being offered, and we want to make sure we are able to provide those” McIntyre said.

Bolstered by a large, unexpected gift from a donor and a Kirkpatrick Family Fund matching grant, they not only established their fund, but also saw it grow to nearly $360,000 in their first year. As they look ahead, McIntyre wants to continue to grow their fund, hoping to reach the $1 million mark and continue to expand on that number well into the future so they can focus their day-to-day operations on continuing to provide the services their patients need.

Tiffany Rea, Integris Speech Language Pathologist hosts a free OKC LOUD Crowd® exercise program five times a week for Parkinson’s patients. Also pictured, Bruce McIntyre, OPA Executive Director.
A Special Gift for a Special Place

When Kathleen Kaufman moved to Oklahoma City as a child, she had a world of possibilities ahead of her. But for her sister, Phyllis, opportunities began and ended with school. Growing up with muscular dystrophy, Phyllis attended a school for handicapped children, but despite her disability, she was a very social girl and yearned for more.

The girls’ mother, Lois, started talking to everyone she encountered, advocating for a safe place beyond the classroom where people with disabilities could socialize, learn and grow. In 1960, the Oklahoma Foundation for the Disabled opened its doors. They started meeting weekly, expanding their services as they grew. Today, Oklahoma Foundation for the Disabled clients participate in a day filled with activities that stimulate the body and mind alongside their friends.

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“I knew it was important to mother, she fought for it, and it was important to my sister,” Kathleen said. “Phyllis went to the foundation for a long time. She loved it. It was a great place for her. She was a very social person, so for her to be with her friends and talk and have fun, it just meant the world to her.”

Phyllis participated in Oklahoma Foundation for the Disabled activities until she died in 1974. Kathleen and her family have continued to be a driving force behind it with many family members serving on the board of directors, volunteering and providing financial support.

The Oklahoma Foundation for the Disabled established a charitable organization endowment fund at the Oklahoma City Community Foundation in 1973, and in 2021, Kathleen established the Lois Jetta Miller and Phyllis Corena Davis Creative Expressions Fund to support creative programming so the foundation can continue to expand activities.

“It’s been in my mind for at least 20 years that I wanted to leave something special for the foundation,” Kathleen said. “It was important to me and would have been important to my family to know we helped this wonderful organization continue to provide a safe place for people to learn and be accepted.”
One of Oklahoma’s most tenured charitable organizations, United Way of Central Oklahoma (UWCO), will celebrate its 100th Anniversary in 2023.

To celebrate this historic milestone, the organization’s board of trustees launched the $100,000 for the 100th Anniversary campaign to fund the agency’s future.

If you ask President and CEO of United Way of Central Oklahoma Debby Hampton what she thinks are the most important issues facing charitable organizations in our community, without missing a beat, she’ll say financial sustainability, relevancy and the need to tap into the energy and enthusiasm of young, future donors. She sees this campaign as a way to address all three of these touchpoints.

During the 100th anniversary campaign, they set a goal of partnering with 10 donors to each contribute $100,000 to the agency’s endowment fund at the Oklahoma City Community Foundation. Their strategy – providing a solid foundation for future endowment gifts and growth. To date, donors have generously contributed more than $1.6 million to the endowment.

Celebrating Their Past, Providing for the Future

In 2020, the Clements family made a gift to the UWCO Fund in honor of Dick & Mary Clements. They will be honored during United Way’s 100th Anniversary Event in 2023.

“The goal for this endowment is to fund all operating expenses, eventually allowing every donated dollar to be 100% committed to funding programs and initiatives,” Debby said. “This endowment investment strategy is for long-term growth and to ensure future support for United Way in our community.”

In turn, the United Way’s endowment growth will positively impact hundreds of organizations and programs across the metro. The United Way provides financial assistance and support for 55 partner agencies operating 102 programs in five different focus areas: strong families, successful kids, healthy citizens, independent living and community preparedness.

In the past several years, we have seen the greatest growth for our Charitable Organization Endowment Program come from designated funds established to support a specific program or named fund to honor loved ones. These funds have a lower threshold to establish, so donors can begin making a lasting impact with a $20,000 gift.”

How to Support an Existing Endowment Fund

- Search for the charitable organization at donate.occf.org.
- See if the organization has a matching campaign at matches.occf.org.
- Add to an existing fund to increase the charitable organization fund’s annual 5% distribution.
- Mail your gift to: Oklahoma City Community Foundation, PO Box 1146, Oklahoma City, OK 73101
  *Be sure to include the charitable organization endowment fund name on your check!
- To donate non-cash assets, please contact us and we’ll help you find your best option.
  Joe Carter: j.carter@occf.org, 405.606.2914.

How to Start a New Endowment or Designated Endowment

With a minimum gift of $40,000, we can help you create a fully-endowed fund that provides at least a $2,000 grant each year.

For organizations with an existing endowment, we can assist you in establishing a designated fund with a minimum gift of $20,000, to support a specific program area or a named fund after yourself or to honor a loved one.

Joe Carter, Vice President, Development
Charitable Organization Endowment Catalog

The following charitable organizations have established permanent endowment funds at the Oklahoma City Community Foundation as of June 30, 2022. Please note, many of these organizations have more than one fund to support various programs. Organizations are listed categorically by service area with the date the fund was established.

**Arts & Culture**
- Oklahoma Visual Arts Coalition | 1998
- Oklahoma Youth Orchestras | 1997
- Oklahoma’s International Bluegrass Festival | 2015
- Opry Heritage Foundation of Oklahoma | 2012
- Paseo Artists Association | 1992
- Photographic Society of America | 2010
- Prairie Dance Theatre | 1979
- Red Earth | 1983
- Science Museum Oklahoma | 1991
- Vocal Sounds of Oklahoma | 2002

**Community Development**
- Association of Fundraising Professionals, Oklahoma Chapter | 2001
- ESCCO - Executive Service Corps of Central Oklahoma | 2007
- Executive Women International | 1982
- Impact Oklahoma | 2008
- Jewish Federation of Greater Oklahoma City | 1978
- Willa D. Johnson Recreation Center | 2020
- Junior Hospitality Club | 1980
- Junior League of Oklahoma City | 1977
- Kiwanis Club Special Activities | 2000
- Leadership Oklahoma City | 1994
- League of Women Voters of Oklahoma | 1999
- McAlester Scottish Rite Temple Restoration/ Education | 2013
- Midwest City Rotary Foundation | 2008
- National Society of Colonial Dames of America in Oklahoma | 1979
- Neighborhood Alliance of Central Oklahoma | 1993
- The Ninety-Nines Association of Women Pilots & Museum | 1990
- Oklahoma Center for Nonprofits | 1993
- Oklahoma City Crime Stoppers | 1983
- Oklahoma City Fire Department Project Life Endowment | 2014
- Oklahoma City Foundation for Architecture | 2009
- Oklahoma City Metro Literacy Coalition | 2015
- Oklahoma County Bar Foundation | 1996
- Oklahoma Energy Trails Foundation | 2018
- Oklahoma Lions Service Foundation | 1992
- Positively Paseo | 2001
- Redbud Foundation | 2000
- Rotary Club 29 Foundation | 1993
- Start Helping Impacted Neighborhoods Everywhere (S.H.I.N.E.) Foundation | 2014
- Jim Thorpe Association | 2010
- USA Softball | 2018
- Vian Community Foundation | 2022
- Women of AT&T, Oklahoma City Chapter | 2010
- Women of the South | 2002

**Education:**

**Community Organizations**
- Alliance Française d’Oklahoma, Inc. | 2009
- FOLD - Friends of Libraries in Oklahoma | 2009
- Friends of the Metropolitan Library System | 1983
- Friends of the Mustang Public Library | 2006
- Friends of the Norman Public Library | 2002
- Library Endowment Trust | 1991
- Oklahoma Humanities Council | 1994
- Oklahomaans for Special Library Services | 1998
- Payne Education Center | 1987
- Weatherford Public Library Foundation | 2010

**Education:**
- Preschool through 12th grade
  - Calumet School Foundation | 2003
  - Casady School | 1977
  - Christ the King Catholic School | 1999

**Christian Heritage Academy | 2008**
- Classen High School Alumni Association | 2017
- Crescent Public Schools Foundation | 2009
- Cristo Rey of OKC | 2022*
- Deer Creek Schools Foundation | 1995
- Edmond Public Schools Foundation | 1989
- El Reno Public Schools Foundation | 2006
- The Foundation for Oklahoma City Public Schools | 1977
- Guthrie Educational Foundation | 2009
- Harding Fine Arts Academy | 2013
- Heritage Hall School | 1996
- Kingfisher Educational Foundation | 2013
- Erna Krouch Preschool | 1979
- Longhorn Football Team One | 2022*
- Bishop McGuinness Catholic High School | 1985
- McLoud School Foundation | 2020
- Midwest City-Del City Public Schools Foundation | 2000
- Millwood School District Enrichment Foundation | 2009
- Moore High School Alumni Association | 2005
- Moore Public Schools Foundation for Academic Excellence | 2001
- Mount St. Mary Catholic High School | 1983
- Noble Public Schools Foundation for Academic Excellence | 2014
- Oklahoma Christian School | 2008
- Oklahoma FFA Foundation | 2000
- Oklahoma Foundation for the Education of Blind Children & Youth | 1998
- Oklahoma Foundation for Excellence | 1988
- Oklahoma School of Science and Mathematics | 1990
- Positive Tomorrows | 1997
- Purcell Public School Foundation | 2016
- Putnam City Schools Foundation | 1992
- Rosary Catholic School | 1996
- Sacred Heart Catholic School | 2000
- St. Charles Borromeo Catholic School | 1998
- St. James Catholic School | 1991

* Asterisk indicates a new endowment established since July 1, 2021

Care about a cause or organization? Be part of their growth for the future! [occf.org/coegift]
St. Mary’s Episcopal School of Edmond | 1994
St. Elizabeth Ann Seton Catholic School | 1997
Trinity School | 1989
Westminster School | 1975

**Education:**

Colleges, Universities & Vocational Schools

- Hillel Foundation - University of Oklahoma | 1982
- Langston University Foundation | 1985
- Metro Technology Centers Foundation | 2014
- Oklahoma Baptist University | 1984
- Oklahoma Christian University | 1971
- Oklahoma City Community College | 1983
- Oklahoma City University | 1971
- Oklahoma City University Film Institute | 1998
- Oklahoma City University Meinders School of Business | 1998
- Oklahoma City University School of Law | 1976
- Oklahoma State University - Oklahoma City | 1983
- Oklahoma State University – School of Civil & Environmental Engineering | 1998
- Redlands Community College | 2000
- Southern Nazarene University | 2001
- Francis Tuttle Foundation | 1993
- University of Central Oklahoma | 1992
- University of Central Oklahoma - Department of History & Geography | 2000
- University of Oklahoma Air Force ROTC Detachment 675 | 2016
- University of Oklahoma Bizzell Memorial Library | 1979
- University of Oklahoma - Jerry Cooper Marching Band Scholarship | 1991
- University of Oklahoma Health Sciences Center | 1986
- University of Oklahoma Fred Jones Jr. Museum of Art | 1993
- University of Oklahoma Naval ROTC | 1988
- University of Oklahoma School of Dance | 2018

**Educational Support**

- Beta Eta Lambda Scholarship Foundation of Alpha Phi Alpha | 2007
- Independent Insurance Agents of Oklahoma Scholarship | 1992
- Markoma Christian Ministries | 2007
- Oklahoma Engineering Foundation Scholarship | 2000
- Oklahoma Pilots Association | 1997
- Oklahoma Youth Expo | 2013
- OSU - Agricultural Education Scholarship Inc. | 2000
- Society of Petroleum Engineers International, Oklahoma City Section Scholarship | 2010

**Environment & Animals**

- Best Friends of Pets | 2004
- Central Oklahoma Humane Society | 2012
- Chocwat Parks Foundation - Historical Sculpture Gardens Perpetual Care | 2006
- Free to Live | 1992
- Friends of Martin Park Nature Center | 1998
- Greater Oklahoma City Parks & Trails Foundation | 2018
- Meinders Garden Maintenance for Myriad Gardens | 2012
- Myriad Gardens Foundation | 1987
- The Nature Conservancy - Oklahoma Chapter | 1993
- Nexus Equine | 2019
- OKC Beautiful | 1993
- Oklahoma City Geological Foundation | 2004
- Oklahoma Horticultural Society | 1989
- Oklahoma Iris Society | 2009
- Oklahoma River Foundation | 2005
- Oklahoma City Riversport Foundation | 2007
- Oklahoma Zoological Society | 1971
- Scissortail Park Foundation | 2018
- Second Chance Animal Sanctuary | 2016

**Health-Related**

- Ability Connection Oklahoma | 1988
- Alzheimer’s Association - Oklahoma Chapter | 2003
- American Cancer Society | 1975
- Arthritis Foundation - Oklahoma Chapter | 1992
- Cavett Kids Foundation | 2001
- The Children’s Center | 1996
- Children’s Hospital Foundation | 1985
- Children’s Hospital Volunteers | 2017
- Community Health Centers - Mary Mahoney Memorial Health Center | 1999
- Epilepsy Foundation of Oklahoma | 1981
- Fundación Manos Juntas | 2016
- Health Alliance for the Uninsured | 2014
- Hearts for Hearing Foundation | 2013
- INTEGRIS Foundation | 1973
- The Leukemia & Lymphoma Society | 1999
- Dean McGee Eye Institute | 1972
- Mental Health Association Oklahoma | 2015
- Mercy Health Center | 1971
- National Multiple Sclerosis - Oklahoma Chapter | 2000
- NorthCare | 2014
- Oklahaven Children’s Chiropractic Center | 1999
- Oklahoma Blood Institute | 2008
- Oklahoma Caring Foundation | 2012
- Oklahoma Heart Hospital Research Foundation | 2014
- Oklahoma Lions Sight Conservation Foundation | 2017
- Oklahoma Medical Research Foundation | 1983
- Oklahoma Parkinson’s Alliance | 2021
- Oklahoma Physical Therapy Foundation | 2004
- Planned Parenthood Great Plains | 1982
- Russell-Murray Hospice | 2006

**History & Preservation**

- Arcadia Historical & Preservation Society | 1993
- Break O’Day Farm and Metcalfe Museum | 2007
- Cleveland County Historical Society | 2004
- Edmond Historical Society | 1999
- Friends of the Oklahoma Historical Society Archives | 1998
- Frontier Country Historical Society | 2009
- Harn Homestead | 1987
- Lincoln County Historical Society | 2015
- Oklahoma Archaeological Survey | 1995
- Oklahoma City-County Historical Society | 1979
- Oklahoma City National Memorial & Museum | 2020
- Oklahoma Hall of Fame | 1978
- Oklahoma Historical Society | 1974
- Oklahoma Railway Museum | 2004
- Oklahoma Society Daughters of the American Revolution | 2013
- Oklahoma State Firefighters Museum | 1999
- Overholser Mansion | 1978
- Pottawatomie County Historical Society | 2018
- Preservation Oklahoma | 2002
- Stillwater Museum Association - Shearer Museum | 2000

**Military & Veterans**

- 45th Infantry Division Museum | 1974
- Dale K. Graham Veterans Foundation | 2021*
- Freedoms Foundation at Valley Forge | 2007

Care about a cause or organization?
Be part of their growth for the future!
occf.org/coegift
Military Order of the World Wars | 2014
Navy League for USS Oklahoma City (SSN-723) - U.S. Navy TACAMO Wing, Tinker AFB | 2002
Oklahoma Military Hall of Fame | 2015
Oklahoma National Guard Association Scholarship Foundation | 2014
Warriors for Freedom Foundation | 2018
Will Rogers Air National Guard Retiree Association | 1997

Neighborhood Associations
Crown Heights-Edgemere Heights Neighborhood Association | 1994
Edgemere Park Preservation | 2002
Historic Brookhaven Neighborhood Association | 1992
Mesta Park Neighborhood Association | 2003
Putnam Heights Preservation Area | 2000
Shartel Boulevard Development Authority | 2003
United Founders Neighborhood Foundation | 2019

Religious Organizations
4HIM - His Healing Helping Hands International Ministries | 2007
All Souls’ Episcopal Church | 2003
Assemblies of God of Oklahoma Foundation | 2014
In Search of The Lord’s Way | 2010
Life.Church | 2005
Scope Ministries International | 1982
Sisterhood of Temple B’na’i Israel | 2005
St. Paul’s Episcopal Cathedral | 2009

Senior Adult Services
Areawide Aging Agency | 1992
Baptist Village Communities – Oklahoma City Location | 1992
Daily Living Centers | 1978

Social Services
Mary Abbott Children’s House | 2011
Aid for Individual Development | 1981
American Red Cross of Central Oklahoma | 1979

Bridges of Norman | 2022*
CARE - Child Abuse Response and Evaluation Center | 1982
CASA of Oklahoma County | 2008
Catalyst Behavioral Services | 2003
Catholic Charities of the Archdiocese of Oklahoma City | 1988
Center for Children and Families, Inc. | 2009
Center of Family Love | 2017
Central Oklahoma Association for the Deaf & Hard of Hearing | 1987
A Chance to Change | 1982
Citizens Caring for Children | 1988
City Rescue Mission | 1999
Coffee Creek Riding Center | 1994
Deaconess Pregnancy & Adoption | 1975
Down Syndrome Association of Oklahoma | 2021
EARC - Employment & Residential Centers | 2003
El Reno Blessing Baskets | 2021
Faith Works of the Inner City | 2012
Food and Shelter, Inc. | 2018
Genesis Project | 1983
Goodwill Industries of Central Oklahoma | 1979
HeartLine | 1986
Homeless Alliance | 2018

Youth-Serving Organizations
American Energy Swim Club | 1988
Big Brothers Big Sisters of Oklahoma | 1983
Boy Scouts of America - Last Frontier Council | 1972
Boys & Girls Clubs of Oklahoma County | 2002
Camp Fire USA - Heart of Oklahoma Council | 1973
El Sistema Oklahoma | 2021
Fields & Futures Foundation | 2015
Girl Scouts - Western Oklahoma | 1978
Junior Achievement of Oklahoma | 1977
Noble County Family YMCA | 2016
Oklahoma City Police Athletic League | 1994
Oklahoma FCA | 1976
Oklahoma Kidz Charities | 2012
Denny Price Family YMCA of Enid | 2006
Salvation Army Boys and Girls Club of Oklahoma City | 1991
Whiz Kids - City Care | 2007
YMCA of Greater Oklahoma City | 1971
YMCA Camp Classen | 1983
Youth Leadership Exchange | 2000

Care about a cause or organization? Be part of their growth for the future! ocf.org/coegift
Charitable Tools

Take advantage of a number of gift planning tools offered. The experienced staff at the OCCF will work with you and your team of advisors to include a charitable gift from your family, business or estate plan.

- **Gift from Will or Trust**
  The most popular type of planned gift whereas a provision is made in a will or trust to gift a portion if not all of an estate for the benefit of a fund or to establish a fund.

- **Charitable Remainder Trust**
  Use this tax strategy to minimize tax consequences on highly appreciated assets while still receiving an income stream for life or a stated period of time with the principal going to a fund at the OCCF.

- **Charitable Lead Trust**
  This can be used to generate a charitable deduction upon receiving a windfall or used as an estate planning tool to minimize estate taxes. After the trust term ends, the remainder returns to either the donor or family, depending on the type of trust.

- **Life Insurance**
  Gift a fully-funded policy during lifetime or name OCCF as a beneficiary.

- **Real Estate**
  Land, vacation homes, commercial properties and primary residences offer a variety of gifting opportunities.

- **Securities**
  Stock, bonds and mutual funds are a very effective asset to gift.

- **Business-related Assets**
  Gifting a portion or all of a privately held C-Corp, S-Corp, LLC or limited partnership can be an efficient tax planning strategy.

- **Retirement Plan Assets**
  Naming OCCF as a beneficiary of a 401(k), 403(b), traditional IRA, SEP or any other type of qualified retirement plan can be the most tax-efficient asset to gift at death.

- **Other Assets**
  Copyrights, royalties, art, gold, coins, patents and oil and gas interests.

What Can You Give to Endowment?

Nearly any asset can be converted into cash for charitable purposes, often with tax saving benefits. Whether you are planning your estate, succession or business sale, or year-end gifting strategies, we can assist you in limiting your tax liability relating to capital gains.

- **Cash Gifts**
  Cash contributions may be in the form of cash, check, money order or cashier’s check, and mailed to: Oklahoma City Community Foundation, PO Box 1146, Oklahoma City, OK 73101-1146

- **Credit Cards**
  Visit donate.occf.org for secure online giving. Give one time, or set up recurring gifts.

- **Cryptocurrency**
  Donating cryptocurrency directly to a 501(c)(3) nonprofit is more tax efficient and can save you money.

- **IRAs**
  Charitable Rollover
  Even though required minimum distributions from a traditional IRA do not start until age 72, you can begin making charitable distributions up to $100,000 at 70¼.

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Oklahoma City Community Foundation
Tax ID EIN: 23-7024262

Donate now:
donate.occf.org
Learn more:
occf.org/coegift
See our matches:
modes.occf.org

OCCF Development staff connect with many different organizations across our community.
Did you Know?
The Oklahoma City Community Foundation’s Charitable Organization Endowment Program is the largest of its kind in the nation?

Join us in creating a brighter future!