

DESIGNATED FUNDS AS OF 8/30/93  
 45TH INFANTRY DIVISION ASSOCIATION -  
 EDUCATIONAL FUND  
 A CHANCE TO CHANGE - CHEMICAL DEPENDENCY  
 INSTITUTE OF  
 OKLAHOMA  
 ALLIED ARTS FOUNDATION  
 AMBASSADORS' CONCERT CHOIR  
 AMERICAN CANCER SOCIETY  
 AMERICAN DIABETES ASSOCIATION  
 AMERICAN RED CROSS-OKLAHOMA COUNTY  
 CHAPTER  
 AREAWIDE AGING AGENCY  
 ARTHRITIS FOUNDATION  
 ARTS COUNCIL OF OKLAHOMA CITY  
 ASSOCIATED CATHOLIC CHARITIES  
 B'NAI BRITH HILLEL FOUNDATION  
 BALLET OKLAHOMA  
 BAPTIST BURN CENTER  
 BAPTIST MEDICAL CENTER OF OKLAHOMA  
 BAPTIST RETIREMENT CENTER  
 BELLE ISLE NEIGHBORHOOD ASSOCIATION  
 BIG BROTHERS/BIG SISTERS OF GREATER  
 OKLAHOMA CITY  
 BISHOP MCGUINNESS HIGH SCHOOL  
 BOY SCOUTS OF AMERICA - LAST FRONTIER  
 COUNCIL  
 BUTTRAM STRING AWARDS  
 CANTERBURY CHORAL SOCIETY  
 CANTERBURY LIVING CENTER EPISCOPAL  
 RETIREMENT COMMUNITY  
 CASADY SCHOOL  
 CASADY SCHOOL-SCHOLARSHIPS  
 CELEBRATIONS! EDUCATIONAL SERVICES, INC.  
 CENTRAL OKLAHOMA ASSOCIATION FOR THE DEAF  
 AND HEARING  
 IMPAIRED  
 CEREBRAL PALSY AND HANDICAPPED OF  
 OKLAHOMA  
 CHILDREN'S MEDICAL RESEARCH FOUNDATION  
 CIMARRON CIRCUIT OPERA COMPANY  
 CITIZENS CONCERNED FOR CHILDREN  
 SCHOLARSHIP PROGRAM  
 CITIZENS CONCERNED FOR CHILDREN, INC.  
 CITY ARTS CENTER  
 CIVIC MUSIC ASSOCIATION  
 CONTACT OF OKLAHOMA CITY  
 CRIMESTOPPERS - FOUNDATION FOR IMPROVED  
 POLICE PROTECTION  
 DAILY LIVING CENTERS, INC.  
 DALE ROGERS GROUP HOME  
 DEACONESS HOME  
 DEACONESS HOSPITAL  
 DEAN A. MCGEE EYE INSTITUTE  
 DEER CREEK COMMUNITY ENRICHMENT  
 FOUNDATION  
 EDMOND EDUCATIONAL ENDOWMENT  
 ELDERCARE ACCESS CENTER - MOBILE MEALS  
 ELDERCARE ACCESS CENTER, INC.  
 EPILEPSY FOUNDATION OF THE SOONER STATE  
 ERNA KROUCH PRESCHOOL  
 EXCHANGE CLUB CHILD ABUSE PREVENTION  
 CENTER  
 EXECUTIVE WOMEN INTERNATIONAL  
 FELLOWSHIP OF CHRISTIAN ATHLETES  
 FELLOWSHIP OF CHRISTIAN ATHLETES - STEPHEN  
 B. PAYNE  
 SCHOLARSHIP  
 FINE ARTS INSTITUTE OF EDMOND  
 FOUNDATION FOR SENIOR CITIZENS, INC.  
 FRANK AND MERLE BUTTRAM STRING AWARDS  
 FREE TO LIVE  
 FRIENDS OF THE METROPOLITAN LIBRARY  
 FUND FOR OKLAHOMA CITY  
 GENESIS PROJECT  
 GREATER OKLAHOMA CITY TREE BANK  
 FOUNDATION  
 GUTHRIE PUBLIC SCHOOLS SESSIONS TEACHING  
 AWARD  
 HARLEY CUSTER MEMORIAL SCHOLARSHIP  
 HEART OF OKLAHOMA COUNCIL OF CAMP FIRE  
 HERITAGE HALL  
 HOSPITAL HOSPITALITY HOUSE MARY KATHRYN  
 LUTON  
 INFANT CRISIS SERVICES  
 INSTITUTE FOR INTERNATIONAL EDUCATION  
 INTERNATIONAL PHOTOGRAPHY HALL OF FAME  
 JASMINE MORAN CHILDREN'S MUSEUM  
 JESUS HOUSE, INC.  
 JEWISH FEDERATION OF GREATER OKLAHOMA CITY  
 JUNIOR ACHIEVEMENT OF GREATER OKLAHOMA  
 CITY, INC.  
 JUNIOR HOSPITALITY CLUB  
 JUNIOR LEAGUE - MARY BAKER RUMSEY AWARD  
 VOLUNTEER AWARD  
 JUNIOR LEAGUE OF OKLAHOMA CITY  
 KERR-MCGEE SWIM CLUB  
 KIRKPATRICK CENTER  
 KIRKPATRICK MAJOR-PRESBYTERIAN HOMES  
 LANGSTON UNIVERSITY DEVELOPMENT  
 FOUNDATION  
 LEADERSHIP OKLAHOMA CITY  
 LUTHERAN SOCIAL SERVICES OF KANSAS AND  
 OKLAHOMA  
 LYRIC THEATRE - CURT SCHWARTZ SCHOLARSHIP  
 FUND  
 LYRIC THEATRE OF OKLAHOMA, INC.  
 MAYFAIR CENTER  
 MEADOWS CENTER FOR OPPORTUNITY  
 MEDICAL RESEARCH FUNDS - ALLERGY  
 MEDICAL RESEARCH FUNDS - ARTHRITIS  
 MEDICAL RESEARCH FUNDS - HEART DISEASE  
 MEDICAL RESEARCH FUNDS - PARKINSONS  
 MEDICAL RESEARCH FUNDS-DIABETES  
 MENTAL HEALTH ASSOCIATION IN OKLAHOMA  
 COUNTY  
 MERCY HEALTH CENTER  
 METROPOLITAN LIBRARY SYSTEM ENDOWMENT  
 TRUST  
 MOUNT SAINT MARY HIGH SCHOOL  
 MYRIAD GARDENS FOUNDATION  
 NATIONAL COWBOY HALL OF FAME AND WESTERN  
 HERITAGE CENTER  
 NATIONAL SOCIETY OF COLONIAL DAMES OF  
 AMERICA IN OKLAHOMA  
 NEIGHBOR FOR NEIGHBOR OF OKLAHOMA CITY  
 NEIGHBORHOOD ALLIANCE OF OKLAHOMA CITY  
 NEIGHBORHOOD SERVICES ORGANIZATION  
 NINETY NINES  
 OKLAHOMA ARTS INSTITUTE  
 OKLAHOMA AVIATION AND SPACE MUSEUM HALL OF  
 FAME AND MUSEUM



## OKLAHOMA CITY COMMUNITY FOUNDATION

### DESIGNATED ENDOWMENT FUNDS AT THE OKLAHOMA CITY COMMUNITY FOUNDATION

#### PURPOSE

A Designated Endowment Fund is a way for non-profit organizations to accumulate contributions from several donors into a single endowment-type fund. The Community Foundation accounts for all of the contributions, oversees the investments, and distributes the earnings to the beneficiary organizations once each year. A Designated Endowment Fund is a permanent fund of the Community Foundation.

The purpose of the Designated Endowment Fund Programs is to help non-profit organizations attract and manage permanent endowment fund support for a steady yearly income. With a Designated Fund at the Community Foundation, organizations do not need to set up their own foundations, process gifts, or manage the investments of an endowment. Donors who designated their gifts for a particular agency can be confident that their contribution will continue to be directed toward that purpose.

#### STARTING A DESIGNATED ENDOWMENT FUND

Any tax-exempt educational or charitable agency serving the Oklahoma City community may, after approval by the Trustees of the Community Foundation, establish a Designated Fund with an initial contribution of \$5,000. The fund may be established with contributions from the organization, individuals, other foundations, or donors interested in the organization. After the fund has been established, additions may be made at any time in any amount. The Designated Fund is established with the understanding that the Trustees of the Community Foundation will preserve the principal of the fund so that it will always be available to generate income support for the organization or charitable cause.

#### CONTRIBUTIONS

Contributions may be in the form of cash, securities, real estate, oil and gas properties, or other marketable assets. All assets which are contributed to the Community Foundation are tax-deductible to the fullest extent of the law. However, nonproducing assets will not be credited to the Designated Fund until they are converted to an income producing form. Any addition to the fund is acknowledged by the Community Foundation both to the donor and to the beneficiary organization. Memorial contributions are also acknowledged to the family.

#### INVESTMENT MANAGEMENT

The Investment Committee of the Community Foundation and its Investment Counsel oversee three local bank trust departments which invest all the Community Foundation's assets at the lowest fees available. All Designated Funds are pooled for investment purposes and each fund shares in the pooled investment return of all investment managers. For the five-year period ending June 30, 1993, the average annual compounded rate of return for Designated Funds was 9.8 percent. This included cash distributions and appreciation allocated to each fund.

Capital gains on the Foundations's investments are allocated to each Designated Fund annually. They are added to the principal of each fund and provide for the future growth of the income of the fund. Capital losses must be distributed if they occur.

Donors can be assured of sound financial management for their contributions; non-profit organizations can be confident that the total return on the fund will be maximized.



OKLAHOMA BAPTIST UNIVERSITY  
 OKLAHOMA BAPTIST UNIVERSITY - BUSINESS PROGRAM  
 OKLAHOMA BAPTIST UNIVERSITY - HOBBS LECTURESHP  
 OKLAHOMA BAPTIST UNIVERSITY - SCHOLARSHIPS  
 OKLAHOMA CHILDRENS THEATRE  
 OKLAHOMA CHRISTIAN UNIVERSITY OF SCIENCE AND ARTS  
 OKLAHOMA CITY ART MUSEUM  
 OKLAHOMA CITY BEAUTIFUL  
 OKLAHOMA CITY COMMUNITY COLLEGE  
 OKLAHOMA CITY FOOD BANK  
 OKLAHOMA CITY FUTURE FUND  
 OKLAHOMA CITY METRO ALLIANCE FOR SAFER CITIES  
 OKLAHOMA CITY NAVY-ESA SQUADRON  
 OKLAHOMA CITY PUBLIC SCHOOL FOUNDATION  
 OKLAHOMA CITY UNIVERSITY  
 OKLAHOMA CITY UNIVERSITY FINE ARTS DEPARTMENT  
 OKLAHOMA CITY UNIVERSITY - LAW SCHOOL DEAN'S FUND  
 OKLAHOMA CITY UNIVERSITY - TAFT INSTITUTE  
 OKLAHOMA CITY UNIVERSITY-SOCIETIES FOR GALLERY, OPERA, AND MARDI GRAS  
 OKLAHOMA COMMUNITY THEATRE ASSOCIATION  
 OKLAHOMA COUNTY COUNCIL FOR MENTALLY RETARDED CITIZENS, INC.  
 OKLAHOMA COUNTY HISTORICAL SOCIETY  
 OKLAHOMA COUNTY SENIOR NUTRITION PROGRAM  
 OKLAHOMA FOUNDATION FOR THE DISABLED  
 OKLAHOMA FOUNDATION FOR EXCELLENCE  
 OKLAHOMA GOODWILL INDUSTRIES, INC.  
 OKLAHOMA HALFWAY HOUSE  
 OKLAHOMA HERITAGE ASSOCIATION  
 OKLAHOMA HISTORICAL SOCIETY  
 OKLAHOMA HORTICULTURE SOCIETY  
 OKLAHOMA LIONS SERVICE FOUNDATION  
 OKLAHOMA LITERACY COUNCIL  
 OKLAHOMA MEDICAL RESEARCH FOUNDATION FOUNDATION  
 OKLAHOMA MEDICAL RESEARCH FOUNDATION - FLEMING SCHOLARSHIP  
 OKLAHOMA PHILHARMONIC SOCIETY  
 OKLAHOMA SCHOOL OF SCIENCE AND MATH  
 OKLAHOMA SHAKESPEARE IN THE PARK  
 OKLAHOMA SOCIETY FOR CRIPPLED CHILDREN  
 OKLAHOMA STATE UNIVERSITY OKLAHOMA CITY  
 OKLAHOMA STATE UNIVERSITY OKLAHOMA CITY - RUMSEY GARDEN  
 OKLAHOMA STATE UNIVERSITY OKLAHOMA CITY HORTICULTURE CENTER  
 OKLAHOMA WESTERNERS INDIAN TERRITORY POSSE  
 OKLAHOMA ZOOLOGICAL SOCIETY  
 OMNIPLEX  
 OPPORTUNITIES INDUSTRIALIZATION CENTER  
 OVERHOLSER MANSION -  
 PASEO ARTIST ASSOCIATION  
 PATHWAYS CHILD DEVELOPMENT CORPORATION  
 PAYNE EDUCATION CENTER  
 PI BETA PHI ALUMNI CLUB SCHOLARSHIP FUND  
 PLANNED PARENTHOOD OF CENTRAL OKLAHOMA  
 PRAIRIE DANCE THEATRE  
 PRESBYTERIAN URBAN MISSION  
 PUTNAM CITY SCHOOLS FOUNDATION  
 RAINBOW FLEET  
 RED EARTH (CENTER OF THE AMERICAN INDIAN)  
 REDLANDS COUNCIL OF GIRL SCOUTS  
 REFERRAL CENTER FOR ALCOHOL AND DRUG SERVICES OF CENTRAL OKLAHOMA  
 RETIRED SENIOR VOLUNTEER PROGRAM OF OKLAHOMA COUNTY, INC.  
 ROTARY FOUNDATION OF OKLAHOMA CITY  
 SAINT ANTHONY HOSPITAL FOUNDATION  
 SAINT ANTHONY-KIRKPATRICK DENTAL CLINIC  
 SAINT GREGORY'S SCHOLARSHIP  
 SAINT JAMES SCHOOL  
 SAINT JOHN'S EPISCOPAL SCHOOL  
 SALVATION ARMY  
 SALVATION ARMY BOYS & GIRLS CLUB  
 SCHOLARSHIP ENDOWMENT  
 SCOPE MINISTRIES INTERNATIONAL  
 SKYLINE URBAN MINISTRIES  
 SOUTHEAST AREA HEALTH CENTER  
 SOUTHWEST MEDICAL CENTER FOUNDATION  
 SPECIAL CARE, INC.  
 SPECK HOMES  
 SUGAR CREEK CAMP  
 SUNBEAM HOME AND FAMILY SERVICES  
 SUPPORT CENTER  
 TRAVELERS' AID SOCIETY  
 TRINITY EPISCOPAL SCHOOL  
 UNITED CEREBRAL PALSY  
 UNITED STATES AIR FORCE ACADEMY  
 UNITED STATES MILITARY ACADEMY  
 UNITED STATES NAVAL ACADEMY  
 UNITED WAY OF GREATER OKLAHOMA CITY  
 UNIVERSITY OF CENTRAL OKLAHOMA  
 UNIVERSITY OF OKLAHOMA COLLEGE OF MEDICINE - WATSON  
 SCHOLARSHIP  
 UNIVERSITY OF OKLAHOMA COLLEGE OF MEDICINE- ROBERT M. BIRD SOCIETY  
 UNIVERSITY OF OKLAHOMA MARCHING BAND SCHOLARSHIP  
 UNIVERSITY OF OKLAHOMA NAVAL ROTC  
 UNIVERSITY OF OKLAHOMA-BIZZELL MEMORIAL LIBRARY  
 URBAN LEAGUE OF GREATER OKLAHOMA CITY  
 USS OKLAHOMA CITY  
 VARIETY HEALTH CENTER  
 VILLA TERESA SCHOOL  
 VISITING NURSES ASSOCIATION  
 WESTERNERS INTERNATIONAL  
 WESTMINSTER DAY SCHOOL  
 WILLIAM FREMONT HARN GARDENS  
 WILSON VOICE AWARDS OKLAHOMA CITY ORCHESTRA LEAGUE  
 WORK ACTIVITY CENTER  
 WORLD NEIGHBORS  
 YMCA-CAMP CLASSEN  
 YMCA-CENTRAL BRANCH  
 YMCA-EASTSIDE BRANCH  
 YMCA-METROPOLITAN  
 YOUTH SERVICES OF OKLAHOMA COUNTY  
 YWCA

## ADMINISTRATIVE FEE

A Designated Fund at the Community Foundation gives non-profit organizations the benefit of professional investment management as well as the accounting and reporting by the Community Foundation's staff and Trustees. The Community Foundation charges an annual fee of two-tenths of one-percent of the average monthly market value of the fund. For a fund with a value of \$25,000, this fee would be \$50 per year.

## DISTRIBUTION OF EARNINGS

A Designated Fund's earnings are its proportionate share of the net income earned by the pooled investment funds of the Community Foundation. These earnings are distributed once each year, usually in October after the Community Foundation annual audit. A full accounting of the activity in each fund from all investments and all contributions is made at the time of the distribution.

## ADDING TO A DESIGNATED FUND

The Community Foundation will provide assistance to donors considering a gift for the benefit of any non-profit organization.

Additions to any established Designated Fund may be made at any time in any amount.

Endowment funds grow when board members and staff of organizations commit themselves to that purpose. The staff of the Community Foundation does not raise funds for any organization but will provide support for any group seeking to increase its Designated Fund.

If you are a donor with an organization or a charitable purpose in mind, or a non-profit organization in need of an endowment, the Community Foundation would like to help you.

Please contact us for further information about the Designated Fund Program or other Community Foundation activities.

## About the Oklahoma City Community Foundation

Since 1969 the Oklahoma City Community Foundation has helped donors accomplish their personal charitable goals and assisted non-profit organizations through grants and endowment fund support.

The Foundation is governed by 12 trustees who represent a broad range of community organizations and interests. A separate fiscal committee composed of officers from three different banks invests and manages the Foundation's assets.

The Foundation's staff works with the Board of Trustees, the Fiscal Committee, donors and charitable organizations. They administer the asset base and seek ways to fill needs in the community.

For the fiscal year that ended June 30, 1993, the Foundation's assets were valued at \$81 million. During the year, more than 250 charitable organizations received grants and distributions from endowment earnings of \$3.2 million.

Through the Foundation, donors can provide ongoing support for specific institutions or general causes by advising the staff and Trustees of their wishes. By donating money to the Fund for Oklahoma City, their contributions can be used at the Trustees' discretion to support needs in the community as they arise.

A gift to the Oklahoma City Community Foundation is a lasting gift of the community.

## TRUSTEES

**George J. Records, President**  
**J. Edward Barth, Vice President**  
**Linda P. Lambert**  
**Frank McPherson**  
**Dr. Jay Stein**  
**Ray T. Anthony**  
**James R. Tolbert, III**  
**Nancy P. Ellis**  
**Jeanette L. Gamba**  
**Raymond H. Hefner, Jr.**  
**William O. Johnstone**  
**Ann Hodges Morgan**

## FOUNDING TRUSTEE

**John E. Kirkpatrick**

## STAFF

**Executive Director**  
**Nancy B. Anthony**  
**Office Manager**  
**Susan Goff Ruzycycki**  
**Comptroller**  
**Carla Pickrell**  
**Grants Administrator**  
**Betsy Roberts**

## OFFICERS

**John L. Belt**  
**Secretary & General Counsel**  
**Eleanor J. Maurer**  
**Treasurer**  
**Marilyn Myers**  
**Assistant Secretary**

## OKLAHOMA CITY COMMUNITY FOUNDATION

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