



Arts for All, a united arts funding organization, is one of 24 charities who have established an endowment fund at the Lawton Community Foundation. The annual Arts for All Festival is the largest fine arts festival in southwest Oklahoma.

Anniversary Match Challenge Helps Build Endowments

Over the past 10 years, the Lawton Community Foundation has made a significant impact in the community through grants, scholarships and annual distributions to charitable organizations. It currently administers the endowment funds of 24 charitable organizations, enabling them to better meet the needs of the community.

In honor of its 10th anniversary, the Lawton Community Foundation launched the Anniversary Match Challenge on November 1, 2008 to encourage donor support of the organization's endowments. Through December 31, 2009, gifts made by individual donors to charitable organization endowments will be matched dollar-for-dollar up to \$5,000, providing these organizations with an opportunity to increase their endowments by \$10,000.

Anniversary Match

Challenge

Lawton Community Foundation

As of September 15, 2009, the match has generated more than \$34,000 in endowment contributions and four charitable organizations have completed the match. "We are very pleased with the success of the match," says Gene Love, board president. "This has been a tremendous opportunity for these organizations to build their endowments and sustain their long-term viability."

One group that has completed the match is Arts for All, a united arts funding

Dear Donors and Friends:

This past year, it has been remarkable to look back at the impact the Lawton Community Foundation has had in our community. Since our establishment in 1999, we have achieved significant growth in both assets and dollars and have reinvested more than \$887,000 back into the community through grants, scholarships and annual distributions to charitable organizations from their endowment funds.



In recognition of our first 10 years, the Lawton Community Foundation launched the Anniversary Match Challenge to encourage gifts to charitable organization endowments. The Trustees committed to match every gift made to a charitable organization dollar-for-dollar up to \$5,000, and as of September 15, 2009, nearly \$35,000 in individual donor gifts have been made. The match, which ends December 31, has also attracted 90 new donors.

Our scholarship program continues to help Lawton area students pursue a higher education, and has awarded nearly \$90,000 in scholarships to area high school students since its inception in 2001.

As we look back at the past decade, we are thrilled with the success of the Lawton Community Foundation in supporting the charitable interests of our community and surrounding area. We also know this is just the beginning. We encourage you to join our efforts to provide a lasting source of endowment that will benefit our community today and in the future.

For more information on how you can join us in building endowment funds to support our community, please contact us at 580/353-7800 or visit www.LawtonCF.org.

Gene Love

President, Board of Trustees

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organization that supports six member groups in the Lawton community. “The challenge match has helped us continue to build a secure financial future for our nonprofit member groups,” says Bobbi Matchette, executive director. “Our endowment fund at the Lawton Community Foundation has given us hope for our future and the ability to keep the arts alive in our community.”

There is still time for other charitable organizations to complete the match. The Trustees have committed \$115,000 to meet the match and contributions made through December 31, 2009 will be applied to the challenge.

How You Can Participate

- Complete the contribution form on the back and mail it in with a check.
- Make an online gift using a major credit card via our secure online service at www.LawtonCF.org.
- Make a noncash gift with real estate, appreciated stocks and bonds, or oil and gas interests.

Don't forget to review the list of organizations participating in the match and be sure to designate which endowment fund(s) your gift is supporting. Gifts must be received by December 31, 2009 to be eligible for the match.

For more information on the Anniversary Match Challenge, please call 580/353-7800 or visit www.LawtonCF.org.

Lawton Community Foundation Anniversary Challenge Match Donors

A special thanks to the following donors who have made gifts during the Challenge through September 15, 2009.

| | | |
|---|---|--|
| Owen S. Ard | Troy Hamilton | Dennis & Kathleen Meyer |
| Mary Ann Allen | Virginia L. Hatcher | Gary L. & Francine Meyer |
| Alliant Techsystems | Col.(Ret.) Raymond S. Hawthorne | Modern Eyes, Ltd. |
| Jack & Joyce Amyx | Melvin L & Helen R Hibbets | Linda Moon |
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| Lt. Col. (Ret.) Francis & Joanne F. Curran | Joye R. Lentz | Phyllis Shelton Fund |
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| Barbara Dawkins | Robert Lawrence & Kimberly J. Lodewick | Brent & LaDonna Smith |
| David Denham | Gene & Carolyn Anne Love | Edwin Stahl |
| Don C. & Zoe W. DuRant | Col. (Ret.) & Mrs. John Ted Marley | Bob & Nancy Stinson |
| Charles Emerson | James H. & Betty J. Martin | Katherine Swanson |
| Sandra Ewing | Mike & Linda Mayes | Kim Thomas |
| Daniel P. & Cynthia M. Farrell | Mary McClure | Claudia Tyburski |
| Marjorie Farrell | Kade McClure | Barbara Vaughan |
| Issac Jay & Kimberly A. Furrh | Col. Earl C. McCrary | William & Ty Vaughan |
| Ronald L. & Loree B. Gaines | Col. (Ret.) Thomas J. & Roben M. McGuire | Lynn & Jeanne Webb |
| Lt. Col. (Ret.) Michael S. & Beatrice L. George | Lt. Col. (Ret.) Richard D. & Deborah K. Mencl | Maj. Charles M. Wesley USAR |
| Lt. Col. John Goltman | Richard Methvin | Todd & Liz Wyatt |

Lawton Community Foundation

Charitable Organization Endowments

The Lawton Community Foundation administers a charitable organization endowment program to provide a reliable source of income for charitable organizations, while also offering a convenient way for donors to make contributions. Currently the program includes 24 organizations who rely upon their endowments to help them meet the varied needs of the community. The organizations are listed below along with the value of their endowment fund as of June 30, 2009, the amount of their annual distribution and the gifts they have received as part of the Anniversary Match Challenge. For more information on these charitable organization endowments, please visit www.LawtonCF.org.

| | Fund Value at 6.30.09 | Fiscal Year 09 Distribution | Match Gifts at 9.15.09 |
|--|--------------------------|--------------------------------|---------------------------|
| Arts for All* | \$ 19,226 | \$ 1,196 | \$ 5,000 |
| Cache School Scholarship* | 77,809 | 3,737 | 5,440 |
| Comanche County Memorial Hospital Foundation | 15,702 | 978 | |
| Field Artillery OCS Alumni Chapter | 32,504 | 1,296 | 2,425 |
| First United Methodist Church Foundation of Lawton | 90,726 | 4,826 | 3,200 |
| Giddy Up 'N Go | 40,126 | 2,334 | 100 |
| Great Plains AMBUCS-Kid's Zone | 16,285 | 1,014 | |
| Greater Lawton Rotary Club** | 20,000 | | |
| Robert E. Greiner School for the Handicapped of Comanche County | 25,558 | 1,589 | |
| Hackberry Flat Foundation | 30,785 | 1,839 | 1,219 |
| Holiday in the Park | 16,647 | 1,046 | |
| Lawton Community Theatre | 14,412 | 898 | |
| Lawton Food Bank* | 20,302 | 625 | 5,000 |
| Lawton – Family YMCA | 14,545 | 907 | |
| Lawton – Fort Sill Armed Services YMCA Gene Love Endowment* | 161,560 | 8,518 | 6,135 |
| Lawton Noon Lions Club Scholarship | 84,812 | 5,000 | 4,400 |
| Lawton Philharmonic Orchestra | 14,369 | 896 | |
| Lawton Public School Foundation | 243,877 | 14,930 | |
| Museum of the Great Plains | 21,615 | 1,330 | |
| Oklahoma Arts Institute Scholarship | 21,187 | 1,000 | |
| On the Chisholm Trail Association Heritage Center | 19,589 | 1,144 | |
| Southwest Oklahoma Genealogical Society | 15,882 | 989 | |
| United States Field Artillery Association Foundation | 46,702 | 1,901 | 1,975 |
| United Way of Lawton/Ft. Sill | 25,334 | 1,465 | |
| Total | \$1,069,556 | \$59,458 | \$34,894 |

* Indicates organizations that have completed the Match Challenge.

** Established after August 1, 2009

A Community Grant helps provide unique therapy

Since 1992, Giddy Up 'N Go has been helping individuals with disabilities to build strength, improve posture and balance and develop self-confidence through therapeutic horseback-riding. An affiliate of the North American Riding for the Handicapped Association, the nonprofit organization provides hippotherapy for children and adults with special needs through a dedicated team of physical therapists, riding instructors, experienced volunteers and specially trained therapy horses.

Established by Lawton physical therapist Jane Ard and special education teacher Carolyn Burton, Giddy Up 'N Go began providing lessons to six students in March 1992 at Suncrest Stables in Lawton. Today the program services approximately 25 riders during 10-week sessions and owns eight therapy horses.

In 2000, the group's board of directors established a charitable organization endowment at the Lawton Community Foundation to help support the program. In November 2008, Giddy Up 'N Go received a Community Grant from the Lawton Community Foundation to purchase an additional pony and riding equipment, as well as to develop volunteer training materials.

"Our families continue to see the benefit of equine-assisted therapy," says Nancy Arntz, board president. "We are so grateful to the Lawton Community Foundation for their help and support over the years. Our program has advanced because of the grants we have received. We are truly blessed!"



Fiscal Year 2009 Community Grants

Through the Community Grants program, the Lawton Community Foundation awarded grants to 14 organizations in November 2008. The program is designed to enhance the quality of life and provide opportunities for Lawton area citizens. Grants are awarded once each year. For more information on our Community Grants program, please visit www.LawtonCF.org.

Buffalo Soldiers Heritage Plaza - \$5,000 to aid in the construction of a memorial to the history of the Buffalo Soldiers.

Cache School Education Foundation - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Field Artillery OCS Alumni Chapter - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

First United Methodist Church of Lawton - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Giddy-Up 'N Go - \$4,700 to purchase an additional pony, equipment and volunteer appreciation materials and training.

Habitat for Humanity - \$5,000 for the construction of a Habitat house to be built in the Lawton View Addition.

Lawton Beautiful - \$5,000 to help with the project of the corridor from the I-44 exit onto 11th Street, past Lawton Municipal Airport to Lee Blvd.

Lawton Food 4 Kids - \$5,000 to provide 25 children with 36 weeks of weekend food-filled backpacks.

Lawton Food Bank - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Lawton-Fort Sill Armed Services YMCA - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Lawton Noon Lions Club - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Lawton Philharmonic Society - \$5,000 to provide free tickets to 100 students and a guest of their choice to attend an LPO concert. The grant will also help subsidize a concert by the Manhattan Piano Trio.

Miracle League of Lawton - \$5,000 to aid in purchasing the necessary equipment to facilitate the program.

U.S. Field Artillery Association Foundation - a dollar-for-dollar matching grant of up to \$5,000 for new contributions to their Charitable Organization Endowment with the Lawton Community Foundation.

Scholarship Endowment Provides a Lasting Reward

A longtime member of the Lawton Noon Lions Club, Lt. Col. (Ret.) Francis Curran led the effort to transfer the group's scholarship fund to the Lawton Community Foundation in 2003. As a result, the club is now able to award a scholarship each year to a student who will attend Cameron University.

Originally from Boston, Francis and Joanne Curran have been residents of the Lawton community since 1965. They both attended Bridgewater State College in Massachusetts, where they earned bachelors' degrees in education. The couple married in 1954 and that same year Mr. Curran joined the U.S. Army. In 1956, they were briefly stationed at Fort Sill, but when they returned in 1965 they decided to make Lawton their permanent home.

After leaving the U.S. Army in 1977, Mr. Curran attended Cameron University and received a bachelor's degree in accounting. He worked as an independent accountant until his retirement in 2000 and continues to provide free tax assistance for seniors through the AARP volunteer tax aide program. Mrs. Curran was an elementary school teacher in Lawton for 27 years before retiring in 1993. The couple are both members of the Lawton Noon Lions Club and Mr. Curran has served as president of the organization. Through their participation in the club, they have assisted in raising money to provide eyeglasses for local children, purchase reading equipment at the public library to assist the visually impaired and help the Oklahoma Blood Institute obtain a blood mobile for use in southwest Oklahoma.

Mr. and Mrs. Curran are also longtime supporters of the Lawton Noon Lions Club scholarship program. During his tenure as president, Mr. Curran encouraged the club to establish the scholarship fund at the Lawton Community Foundation. The fund supports an annual four-year scholarship for a Lawton area student to attend Cameron University. "The Lawton Noon Lions Club had created a small scholarship fund, but we weren't able to do very much with it," says Curran. "Once we began growing



the fund we moved it to the Lawton Community Foundation and through their help and other gifts we are now able to make a more significant award and help more students."

In 2009, the Lawton Noon Lions Club participated in the Lawton Community Foundation's Anniversary Match Challenge in an effort to help build their scholarship endowment. The group is close to meeting the \$5,000 match maximum offered, receiving \$4,400 in gifts as of September 15, 2009. Donors can participate in the match challenge by making gifts by December 31, 2009.

Scholarship and award funds provide an efficient way for donors or organizations to help students with educational needs or to recognize achievement. The Lawton Community Foundation can administer these endowment funds and provide perpetual support for local scholarship programs. If you are interested in establishing a scholarship or award fund please contact us at 580/353-7800 or visit www.LawtonCF.org.

Lawton Area Students Receive Scholarships

The Lawton Community Foundation together with the Lawton Noon Lions Club presented more than \$19,000 in scholarships to 11 area seniors on May 12, 2009. The scholarships were awarded during a special breakfast event featuring guest speaker Cindy Ross, Cameron University president.

Recipients of the Lawton Community Foundation Scholarship were awarded \$1,500 each, and the Lawton Noon Lions Club Scholar received \$1,000 per year for four years. Cameron University was a new contributor to the scholarship program this year, matching scholarships for three recipients attending the university, Ethan Knox, Jazmine Foster and My Nhung "Sara" Nguyen. Scholarship recipients are selected by the Lawton Community Foundation scholarship committee with the assistance of high school counselors and a committee at each school.

2009 Lawton Community Foundation Scholars:

Jazmine Foster - Lawton High School
Jenna Hamm - Frederick High School
Kaitlyn Jennings - Duncan High School
Leslie Jones - Cache High School
Ethan Knox - Elgin High School



Stephanie Little - Eisenhower High School
Laura Lopez - Altus High School
Derek Rich - MacArthur High School
Kaitlyn Taylor - Lawton High School
Taniqua Ward - Eisenhower High School

2009 Lawton Noon Lions Club Scholarship Recipient:

My Nhung "Sara" Nguyen - MacArthur High School

Giving Through the Lawton Community Foundation

Why it makes sense

Tax Benefits - Because we are a 501(c)(3) public charity, gifts to the Lawton Community Foundation receive the maximum tax benefits allowed.

We Keep It Simple - By establishing a fund at the Lawton Community Foundation, you can avoid administrative burdens, legal complexities and compliance requirements associated with private foundations.

Flexibility - We are able to accept a wide variety of gifts including cash, appreciated stocks, mutual funds and other marketable securities, life insurance policies, retirement plan assets and business-related assets such as closely held stock from S corp., C corp. and LLCs.

Cost Effective - As an affiliate of the Oklahoma City Community Foundation, they provide all of our administrative and investment services. Under this structure, we are able to offer a wide range of services at a much lower cost when compared to operating a private foundation or similar entities.

Fund Options

Advised Funds - Donor-advised funds are the simplest and most flexible option for donors to accomplish their charitable goals. We offer three options of Advised Funds: Legacy Fund, Gift Fund and Express Fund.

Legacy Fund - With a required minimum balance of \$10,000, a Legacy Fund is the best alternative for families or individuals who may be considering creating a private foundation. It offers both our proven investment management as well as administrative support including the handling of all required reporting.

Gift Fund - Established with a minimum of \$10,000, a Gift Fund is a less expensive and more effective alternative to commercial gift funds. A Gift Fund is ideal for the individual who wants investment performance and the ability to distribute the total gift to charity.

Express Fund - With a completely spendable fund balance, an Express Fund is a perfect vehicle for individuals who want to make a year-end gift of cash, appreciated stock or another non-cash asset to benefit one or more charitable organizations. An Express Fund can be established with a minimum gift of \$1,000.

Charitable Organization Endowment Funds - The Lawton Community Foundation currently administers endowment funds of 24 charitable organizations. Through the program, the charitable organizations receive an annual distribution from their endowment and will receive the annual distribution for perpetuity. The endowments not only provide a reliable source of income to these organizations but also serve as a convenient way for donors to make contributions.

Scholarship & Award Funds - Established by individuals, corporations, alumni groups and civic organizations, scholarship and award funds are permanent endowments that provide support for those who are seeking to improve themselves through higher education or additional post-high school training. Scholarship and award funds can be established with a minimum gift of \$20,000.

Types of Gifts We Accept

Cash Gifts - Cash is one of the easiest ways to make a charitable contribution. A cash contribution to the Lawton Community Foundation can be in the form of cash, check, money order or cashiers check. We also accept credit card gifts to existing endowments via a secure online service.

Real Estate - Real estate may be given at appraised value. If appreciated, capital gain taxes may be avoided on the real estate appreciation if the property is donated to the Lawton Community Foundation. Gifting real estate may allow donors to preserve liquid assets while maximizing their charitable contributions.

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 for your family, you can use any retirement plan assets to establish an endowment at the Lawton Community Foundation.

Business-related Assets - We can 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, offer the ability to realize significant tax savings while maximizing charitable contributions. The securities may be given so that the donor receives an income tax deduction equal to the fair market value of the donated assets while avoiding the capital gains tax on those donated assets. Our staff will work closely with donors and their professional advisors to facilitate the contribution of both marketable and closely-held securities. By having accounts at many brokerage firms, we can easily facilitate the transactions of donors' securities.

Oil and Gas Interests and Royalty Interests - Both oil and gas royalty interests may also be donated to benefit an endowment at the Lawton Community Foundation. The contribution of oil and gas interests may allow the donor to preserve liquid assets while maximizing charitable contributions.

Life Insurance - Life insurance can be an effective means to fund a charitable giving plan without significant outlays of cash. Since life insurance generally results in a large payment at one time, this can be an ideal vehicle to initiate family philanthropy through the establishment of an advised fund.

For more information on giving to the Lawton Community Foundation, please call 580/353-7800 or visit www.LawtonCF.org.

Lawton Community Foundation Investment Policy: A Summary

An affiliate of the Oklahoma City Community Foundation, the Lawton Community Foundation follows their investment policy which is designed for an endowment fund to provide annual distributions for charitable purposes in perpetuity. The investments need to allow the fund to generate distributions, grow to accommodate inflation and continue to exist in the future.

The Oklahoma City Community Foundation Trustees' investment policy has four major objectives: capital preservation; inflation protection; continuing source of annual distribution for charitable purposes; and investment return in the top third of professionally managed funds. These objectives lead to a portfolio of high-quality equity

investments and fixed-income securities. The portfolio is structured by asset allocation to a range of equity styles and then to style-specific managers who are among the best in their area. The asset allocation between equity and fixed-income investments allows for growth in value and stability in distribution expectations over time.

The benchmarks for measuring performance are currently the Standard and Poor's 500 stock index and the Barclays Government/Credit Intermediate bond index. Style-specific managers will be measured by appropriate benchmarks for that particular style. Managers are judged on a time horizon of three to five years.

Distribution Policy stabilizes economic impact on endowments

Of primary importance to any endowment program are prudent distribution policies that will over a long-time horizon produce the maximum number of dollars for charitable causes or organizations. Spending rules are commonly used to provide a structured method of making distributions from an endowment fund that protects the distribution stream from inflation, provides a predictable annual distribution and allows the Investment Committee to focus on maximizing total investment return.

Since 1999, the Lawton Community Foundation has employed a distribution policy that is designed to permit endowments to capitalize on good investment years as well as protect in the event of a low or negative return market. The experiences of the past few years, where returns have been on both extremes of investment performance, underline the importance of a policy that stabilizes the effects of market conditions on annual distributions from an endowment.

Cash distributions from the endowment funds of the Lawton Community Foundation are based on a spending policy that calls for distributing 5 percent of the fund's average market value. The remaining investment return is left with the fund to add to the value, which protects future distributions from inflation. Our policy ensures that the annual distribution from the fund is more predictable because the amount is not tied to current income, which fluctuates due to shifts in market conditions, but is based on a rolling eight-quarter average of

the fund's market value, adjusted for additional contributions. "Large educational and institutional endowment managers across the country seem to agree that an amount close to 5 percent of the average market value is a safe amount to spend and still provides protection for the principal," says Carla Pickrell, director of administration for the Oklahoma City Community Foundation, which oversees the investment and distribution policies for the Lawton Community Foundation.

The 5 percent figure is based upon an estimate of two factors over time: market return and inflation. A conservative prediction of average market return in a balanced fund over time is 8 percent. It is widely expected that inflation will average 3 percent over time. This leaves 5 percent to spend while still protecting the fund's value for the future.

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. Instead, investment managers are able to focus on achieving the best total return.

"The total return concept is especially important because of this active goal of growing endowment funds," Pickrell says. "There is an available annual distribution of 5 percent from the endowment that is increasing in value over time even if there are no additional contributions to the fund."

Your gift can help others realize their dreams

Cache High School graduates Hunter and Tanner Cook have experienced the impact of giving firsthand. The twins both dreamed of careers in the medical profession and thanks in part to the Lawton Community Foundation Scholar awards they received, today they are realizing their dreams. After graduating from the University of Oklahoma in 2008, Hunter is currently in medical school at Oklahoma State University and Tanner is attending dental school at the University of Oklahoma Health Sciences Center.



Hunter and Tanner Cook

and its surrounding area are selected by the Lawton Community Foundation scholarship committee with the assistance of high school counselors and a committee at each school.

"To me, the Lawton Community Foundation (Scholar Award) was more than just a check towards college.

When I was going to school, it was very nice to realize that my community was behind me," says Hunter. "They believed, because of things that I have done and said, that I could succeed and accomplish great things. Every bit of encouragement I got during that time was only fuel to the fire of wanting to excel in my classes and get accepted into medical school."

"It's so nice coming from a small town and knowing that the town is supporting you and helping you to do well," says Tanner. "Plus, the financial support really helped me to concentrate on school without incurring a lot of debt."

Established in 2001, the Lawton Community Foundation's scholarship program has awarded nearly \$90,000 in scholarships since the program's inception. Scholarship recipients from Lawton

This is one type of fund that can be established at the Lawton Community Foundation. Donors may also want to consider the flexibility an advised fund offers. Whatever your charitable goals may be, the Lawton Community Foundation can help you.

The Lawton

Community Foundation

The Lawton Community Foundation
is an affiliate of the Oklahoma City
Community Foundation

P.O. Box 6033 • Lawton, OK 73506

Contribution Card

THE LAWTON COMMUNITY FOUNDATION

Name _____

Address _____

City _____ State _____ Zip _____

To benefit the following charitable organization endowment:

In the amount of \$ _____

Your contribution is fully tax deductible.

Please make checks payable to: The Lawton Community Foundation

This gift is in memory of _____

in honor of _____

Please send an acknowledgement of this gift (without reference to amount) to:

Name _____

Address _____

City _____ State _____ Zip _____

Please detach and include in envelope with your contribution and mail to:

The Lawton Community Foundation, P.O. Box 6033 • Lawton, OK 73506

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The
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In accepting a contribution to any fund, the Oklahoma City Community Foundation trustees commit to the donor that the contribution will be protected for the charitable purpose originally intended. The variance power, as described in the governing documents of the Oklahoma City Community Foundation, assures donors that if the charitable purpose of their contributions becomes impractical or impossible, the distributions will be directed to similar purposes in the community.