

The givers

Tulsa Community Foundation celebrates 10 years of giving back to the community.

BY TARA LYNN THOMPSON

Photos courtesy of Tulsa Community Foundation.



A sampling of Tulsa Community Foundation projects. Clockwise from top left, TCF staff, donors and trustees gather for a strategy meeting; students at Roosevelt Elementary School receive school supplies from the Partnership for the Availability of School Supplies (PASS) program in August 2009; actors and donors from the film "The Ultimate Gift" gather at the Tulsa premiere in fall 2006; Tulsa Beautification Foundation projects included trail improvements near the Arkansas River; the Educare II facility at Hawthorne Elementary School; Executive Director Phil Lakin announces Tulsa Beautification Foundation efforts at a news conference.



Clockwise from top left, the Tulsa Beautification Foundation funded beautification projects at the Tulsa International Airport, including these planters, installed in July 2007; Tulsa Police officer Lori Mullin poses with Roscoe, one of the retired police horses TCF purchased and later donated, through a competitive grant process, to nonprofit organizations with equine programs; the horse placement selection committee; a rendering of ONEOK Field, which TCF helped make possible through the purchase of a \$25 million bond.

PLANNED GIVING

LIFE Senior Services

Bill Major helps seniors stay independent. As executive director of LIFE Senior Services, his job is to empower the senior population. And that is exactly what Tulsa Community Foundation has, in turn, done for Major and his organization.

"What (TCF) can do for a lot of nonprofits, we can't do on our own," Major says.

LIFE Senior Services has been helping seniors in the Tulsa area maintain or regain independence since 1973. Annually, the organization assists approximately 25,000 seniors and family caregivers through programs and services such as Adult-Day Services, Senior Centers and the SeniorLine.

"TCF is a resource to allow us to do our job better," Major says.

LIFE Senior Services partnered with TCF through its Planned Giving Program, a way to assist nonprofit groups with education, legal advice and marketing tools to develop a solid endowment without stressing the nonprofit's resources or workforce.

"Their planned giving initiative is really a great resource ... because it gives us a chance to have top-level expertise in planned giving through something we can afford," Major says. "The planned giving program TCF is doing is a great model."

America's first foundation

Cleveland Foundation was the first U.S. community foundation, formed in 1914. Even within Oklahoma, Tulsa was the baby of the family, following the formation of community foundations in Duncan, Bartlesville, Norman, Lawton, Enid, Broken Arrow and Oklahoma City, which formed a community foundation in the 1960s, says Phil Lakin, CEO of Tulsa Community Foundation.

Philanthropy in Tulsa is visible.

From foundation to shingles, from the beginning to now, Tulsans have built their city with a foundation of family generosity.

That is Tulsa's past. The Tulsa Community Foundation (TCF), a public charity collecting and distributing donor gifts into the Tulsa community, has been focused for 10 years on making giving part of Tulsa's future.

"In the glory days of Tulsa, we could rely on ad hoc assemblages of major corporate and individual leaders to help pursue significant challenges or opportunities for the city," says **George Kaiser**, founding board member for TCF. "Because Tulsa had such strength and depth of public-private partnership, we did not have need for a community foundation and were the only major U.S. city not to have formed one by 1998.

"But after several waves of corporate and individual outmigration and death (another

style of outmigration, I suppose), we no longer could rely upon the kind of leadership required on an impromptu basis. To continue the city's progress, I felt we needed a permanently functioning mechanism to fulfill that role."

In 1998, TCF was formed to help fortify Tulsa's philanthropic spirit through donor support services, a way to take away the stressful aspects of giving — taxes, paperwork, administrative tasks — and allow donors to focus on their charitable passion.

"The fun stuff for most people is giving to a needy organization," says **Henry Will**, shareholder and director at Conner & Winters and founding board member of TCF. "All this administrative burden ... they take it off your shoulders and do it for you."

At last, Tulsa had a community foundation to aid donors and nonprofits alike by filling in the research and administrative gaps.

"Tulsa was the last major metropolitan

PARTNERED PLEDGES Tulsa Ballet

It starts with a classical ballet move. It ends with at-risk students finding empowerment.

The world-renowned Tulsa Ballet brings the beauty and elegance of dance to vulnerable youth within the community. Through the outreach program Leaps in Motion, funded through the George Kaiser Family Foundation and Tulsa Community Foundation, at-risk children learn the fundamentals of classical ballet, along with training in physical conditioning, concentration, visual and aural memory, and teamwork.

"I see an increase in their self-esteem. We have the numbers to support this, but you can see it with your eyes," says **Amy Miller**, Tulsa Ballet director of development, concerning the youth in the programs.

With personal encouragement and positive feedback from the dance instructors, the students experience the rewards of accomplishment.

"For a lot of these kids, it's something they've never had," Miller says.

The George Kaiser Family Foundation and Tulsa Community Foundation made the program possible through a five-year pledge of support. Miller says their involvement encourages other supporters to see the value and worth of the program and opt to get involved.

"They really have a reputation for funding quality programs," Miller says. "When you see those two names on the donor list, people think this must be a good program. It helps us get new donors."



Phil Lakin, Tulsa Community Foundation executive director; **Joe Cappy**, board of trustees chairman from 2006 to 2007; **George Kaiser**, founding board member; and **Bill Thomas**, TCF board of trustees chairman.

city to have a community foundation," says **Phil Lakin Jr.**, the foundation's CEO.

It didn't take long, however, with TCF's personal and professional touch, for the foundation to succeed not only beyond all prior objectives, but also beyond all prior community foundations.

THE LARGEST IN THE COUNTRY

By 2005, TCF had eclipsed even the New York Community Foundation, formed in 1924, whose assets equaled \$2.135 billion. Although TCF ended its first year on Dec. 31, 1998, with only \$117,000 in assets, by Dec. 31, 2009, the foundation had surpassed all others in the nation.

"We're at \$4.4 billion (assets) now," Lakin says. "We beat New York by \$2 billion. We're not only bigger; we're bigger by double."

Since conception, TCF has made well over 10,000 grants, with 3,094 grants in 2009 alone. It has grown to 450 donor funds established by a family, corporation, individual or group of individuals; 11 sup-

porting organizations; and 250 nonprofit organizations that have established their endowment funds through TCF.

"I truly believe that Tulsa is blessed with a spirit that literally calls and drives people to action when such is needed, not only by means of financial resources but in contribution of time, talents and service," says **William F. (Bill) Thomas**, co-owner of Senior Star Living and current TCF board of trustees chairman. "TCF was an outgrowth of that."

ONE MAN'S VISION

TCF began as "simply a stirring in one person's mind (originally, Kaiser) of what the potential of such an organization just might be, then rallying around a central theme of what ought and could be by sheer determination and, of course, by example," Thomas says. "(And it became) so darn infectious for a community of leaders in Tulsa that it is hard to hold down."

Other reasons behind TCF's success are the low donor fees and broad investment

CHALLENGE GRANTS

Camp Fire USA Green Country Council

They are resourceful, ambitious and challenge ready, just like the students they teach. Camp Fire USA Green Country Council sees a goal, sets a goal and exceeds that goal.

During the Tulsa Community Foundation's recent endowment challenge grant program, Camp Fire set a goal to raise \$125,000. They surpassed it by 207 percent, raising \$258,389.

"We went over that amount.

For that effort, we received \$25,000 in cash," says **Bobbie Henderson**, executive director of Camp Fire USA Green Country Council. "... Tulsa Community Foundation realized the agencies involved would be devoting time to generate those planned gives, time usually spent on general fund raising.

"The cash award gave us incentive to shift the way we

used our time without losing out on immediate fund raising."

Although considered a small- or medium-sized organization, Henderson says, Camp Fire annually serves 2,500 kids in 24 schools in low-income areas and 11 Tulsa Housing Authority apartment communities.

Tulsa Community Foundation offers the organization the technical support necessary for a limited nonprofit to reach beyond the boundaries of its small staff.

"I remember going to fund-

raising workshops 20 years ago and hearing about community foundations," Henderson says. "It was always amazing to me, as philanthropic as Tulsa is, that we didn't have a community foundation.

"It thrilled me when George Kaiser put Tulsa Community Foundation together. It was a huge milestone for our community. It advances even further our very philanthropic community."

PLANNED GIVING LIFE Senior Services

They do more than provide cable. In fact, the Cox Communications worker installing your Internet or taking your payment over the phone could be the same person sending your disabled child to college, assisting your parent suffering from Alzheimer's disease or providing food to your suddenly unemployed neighbors.

This year, the 2,000 Cox employees in Oklahoma will dig out of their own pockets and give away \$595,000 in grants. Providing cable television is

their day job.

In 2005, the employees of Cox Communications launched the Cox Connects Foundation, a way to give back to the communities where they work and live.

The foundation's grant decisions are not made by management but solely through an all-employee-based 21-member advisory board. The Tulsa Community Foundation trains each board member. Each member then undertakes the responsibility to review all the grant applications, rate them and visit with co-workers. The board then meets to decide which applications best repre-

sent the giving wishes of the employees.

Within the first year, they had raised \$100,000. At the end of 2009, that annual number had increased to \$595,000.

"Our foundation is funded by employees, so our giving each year is dependent on how much our employees give each year," says **Tiffani Bruton**, director of public affairs for Cox Communications. "Not including this year, to date we've awarded \$1.6 million in grants."

Broken down, that includes more than \$90,000 for classroom scholarships, \$234,000 to nonprofit organizations ear-

marked for specific programs and grant money for 78 students to attend college. They also take care of co-workers by designating 25 percent of funds raised to be placed in the Employee Relief Fund, a way to help Cox employees and families when disaster or sickness strikes.

Through quarterly and yearly reports, the Cox employees know exactly where every dollar is spent.

"You can see from the growth of the funds what our employees feel about the foundation," Bruton says.

opportunities for donors, says **Joe Cappy**, retired CEO of Dollar Thrifty and TCF board of trustees chairman from 2006 to 2007.

"When I was approached to go on the board as a trustee was the first time I decided to find out about (TCF)," Cappy says. "That's when I got excited about the foundation, excited from a personal standpoint, as well as a community standpoint."

At the time, Cappy says that he had a charitable trust fund with Fidelity. After comparing the two, he was "flat out amazed at the different benefits and lower cost," he says, from the lower basis points, to the minimum grant amounts, to the ease of putting money in or taking money out, as well as the transparency and personal attention.

"We're the staff for the community. Anyone who puts money into TCF has access to our staff," Lakin says. "We're their charitable giving office for donors of \$500 or \$5 million. It doesn't matter. We do the same amount of work."

Under the TCF umbrella, organizations are also exempt from an excise tax and the requirement that they give away a minimum of 5 percent per year, as private foundations are required to do, Cappy says.

"Private foundations last year, when the stock portfolios sank, were still required to give away 5 percent," Cappy says. "If they had been allowed to wait, they could have given away four or five times that."

The reality of TCF's importance in the Tulsa community isn't chiseled on the top of a building in bold letters. It is, however, apparent in the help that arrives when Tulsans need it most.

"They are more than just a collection of donor-advised funds," says Will, founding trustee. "(TCF has) been an active program in the community."

AN ACTIVE PARTICIPANT

In December, for example, TCF garnered support from organizations and the community to raise \$1 million to give to service organizations that help needy Tulsans struggling because of the national recession.

"You just have to sit in that room, with all of these Tulsans, to really get an appreciation for the spirit of giving in Tulsa," says **Chet Cadieux**, chairman and CEO of QuikTrip and TCF board trustee. "You have all of these people who are selflessly giving their time, effort and money to make our community a better place. But what is really amazing is that they spend at least as much time helping other people to do the same thing ... to give of themselves to others. It is really inspiring."

From past to present to the planned future, TCF has created a family of philanthropists with different backgrounds and various last names to work collectively for the continued charity of one Tulsan to another, explains **Phil Frohlich**, founder/owner of Prescott Group Capital Management and TCF board trustee.

"From day one, giving has been the history of Tulsa," he says. "Our founding families had a passion for giving back to the community. We've all received the benefit for it." ■

For additional information about the Tulsa Community Foundation, visit www.tulsacf.org.

TulsaPeople.com

Go online to view a timeline of TCF's accomplishments and projects over the last decade.

RESEARCH AND ENDOWMENT BUILDING Mental Health Association in Tulsa

Help is one phone call or one e-mail away. That is the kind of support the Tulsa Community Foundation offers Mental Health Association in Tulsa.

"I've even called about tax questions," says **Leah Brumbaugh**, the association's development director. "I can't speak highly enough about the quality of the staff and their expertise. For Tulsa to have them in place is invaluable."

Mental Health Association in Tulsa has been educating, advocating and helping those with mental health issues for more than 50 years. The organization provides mental health services and programs across the spectrum of age or circumstance.

Three years ago, the association partnered with TCF to help build an endowment so the organization can continue advocating for mental health issues for another 50 years.

TCF also offers the support necessary to accomplish an enormous task on a small budget for outstanding results. Brumbaugh says that if she has a particular program, she can contact TCF to do directional research and find out what foundations might be interested in helping.

"They can be a good connector between the donor and the organization," she says.