



TULSA COMMUNITY  
FOUNDATION

CHARITY *With* CHOICE

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## LETTER FROM THE EXECUTIVE DIRECTOR

Thank you. The first sentence of Tulsa Community Foundation's first annual report must lead with "thank you," and its meaning cannot be overemphasized. TCF is deeply grateful to the countless individuals, board members, nonprofit partners, corporations, professional advisors, and so many others, without whom our efforts would have been fruitless. TCF is this community's foundation: it is a reflection of our community's overwhelming philanthropic spirit and its concern for the lives and well-being of others.

Our donors and partners have made TCF the largest community foundation in the nation in just eight short years. This designation has been earned, and should bring a certain level of pride to all of us. The spirit of philanthropy has always been a distinguishing characteristic of Tulsa, and we should use it, in a humble way, to set ourselves apart from other cities in this nation and world. Each of us must continue to care for, to nourish, to share and to pass along this spirit to our families and fellow Tulsans. The spirit of philanthropy is not something we can take for granted or disregard. Being personally or corporately altruistic is rarely innate. Therefore, we must share what we know and what we've been taught in an effort to inspire and challenge one another to become more charitably-minded and involved.

Since its inception, TCF has made significant strides in better serving our donors and nonprofit partners. By becoming more aware of the needs in our community, we are better able to match the funding needs of local charities with the funding desires of our donors. We will continue to implement programs like Step Up Tulsa which help to identify these needs. TCF will serve as a neutral convener on issues that positively affect the entire community and which afford multiple donors the ability to partner and collectively focus their charitable giving efforts.

As Aristotle wrote in *Ethics*, "To give away money is an easy matter and in any man's power. But to decide to whom to give it, and how large, and when, and for what purpose and how, is neither in every man's power nor an easy matter." TCF's place in this community has been and will continue to be focused on making charitable giving more efficient, effective and rewarding – so the stories that are told in the pages that follow will be multiplied over and over and so more people will come to realize the simplicity and joys of charitable giving.

Sincerely,



Phil Lakin, Jr.

Executive Director



# TCF HISTORY

## History

In 1998, George B. Kaiser called on several charitably-minded leaders to help create Tulsa Community Foundation (TCF). Tulsa was the last of the 50 major metropolitan areas to be without a community foundation. TCF was organized as a tax-exempt, public charity to receive, protect and distribute gifts from individuals and organizations for the improvement of the Tulsa and eastern Oklahoma area. From the beginning, TCF's mission has been to be the recognized, community-owned institution that initiates, teaches and encourages personal and corporate charitable giving today to ensure that the philanthropic needs of eastern Oklahomans can be met for all generations.

The foundation is a collection of many charitable funds varying in size from \$5,000 to multiple millions of dollars. Each fund has its own identity and philanthropic purpose and each benefits from being invested with other funds to create a lasting community resource. TCF provides a simple, efficient way for individuals, families and companies to effectively invest their charitable resources back into the community to produce real change. Currently, TCF manages approximately \$3.4 billion invested through:

- **252 Donor Advised or Donor Designated Funds**, established by individuals, corporations and private foundations.
- **13 Scholarship Funds**, established by individuals, corporations and charitable organizations.
- **215 Charitable Agency Funds**, established by and for the benefit of specific charitable organizations.
- **12 Supporting Organizations**.

Regardless of the donor's specific area of interest (early childhood education, the environment, health care, social services or a host of other important community needs), TCF will create an effective and efficient process to assist each donor to accomplish his/her charitable objectives.

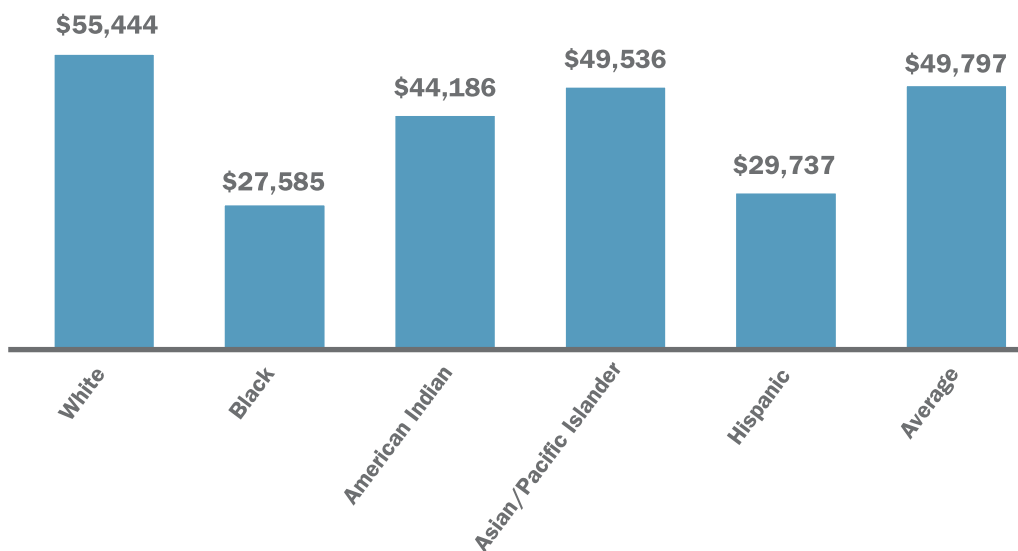
# Community Needs

## COMMUNITY NEEDS

The issues facing greater Tulsa and eastern Oklahoma are complex, demanding and diverse. To develop successful solutions, TCF, and its community partners must take decisive steps toward understanding the underlying issues and creating strategies that are comprehensive, sustainable and systems-focused. Mayor Kathy Taylor recently challenged Tulsa-area residents, saying, “It is time to bring our community together to aggressively and positively move the trends in our great City. We have a history of thinking big and thinking with an entrepreneurial spirit. There is a new kind of energy in Tulsa. We need to capture it. It is time to make historic progress in Tulsa again!”

While the graphs and charts below do not portray Tulsa as a region where everything is perfect, these data points provide a snapshot of where we are as a community. As a foundation and as a community, we will never get to where we want to be unless we first know where we are. In contrast, the positive statistics should strengthen our resolve to tackle and overcome the issues and need areas which prevent our community from becoming the world-class region we know that it can be.

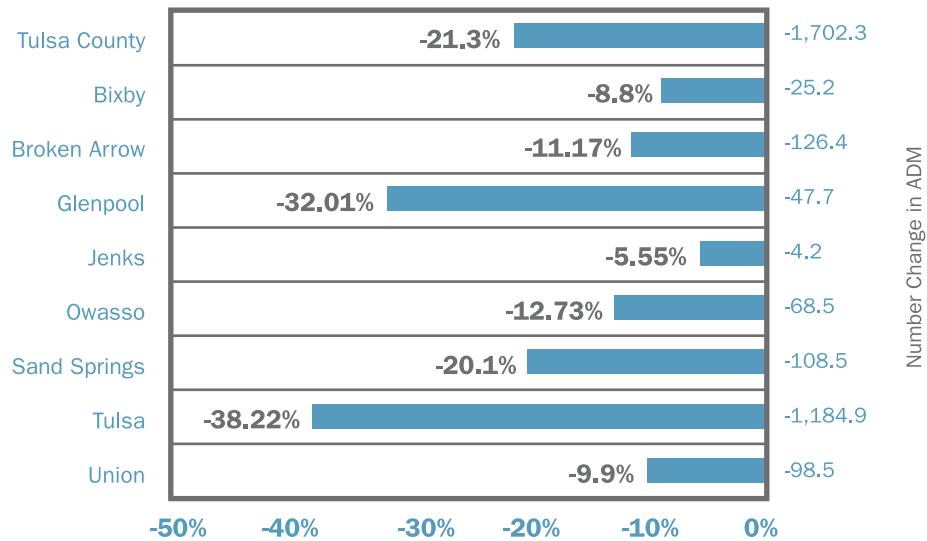
**Tulsa County Median Family Income**



## Many 9th graders do not make it to graduation

Percent Change in Average Daily Membership  
from 9th Grade to 2004 Graduating Class

Tulsa County School Districts

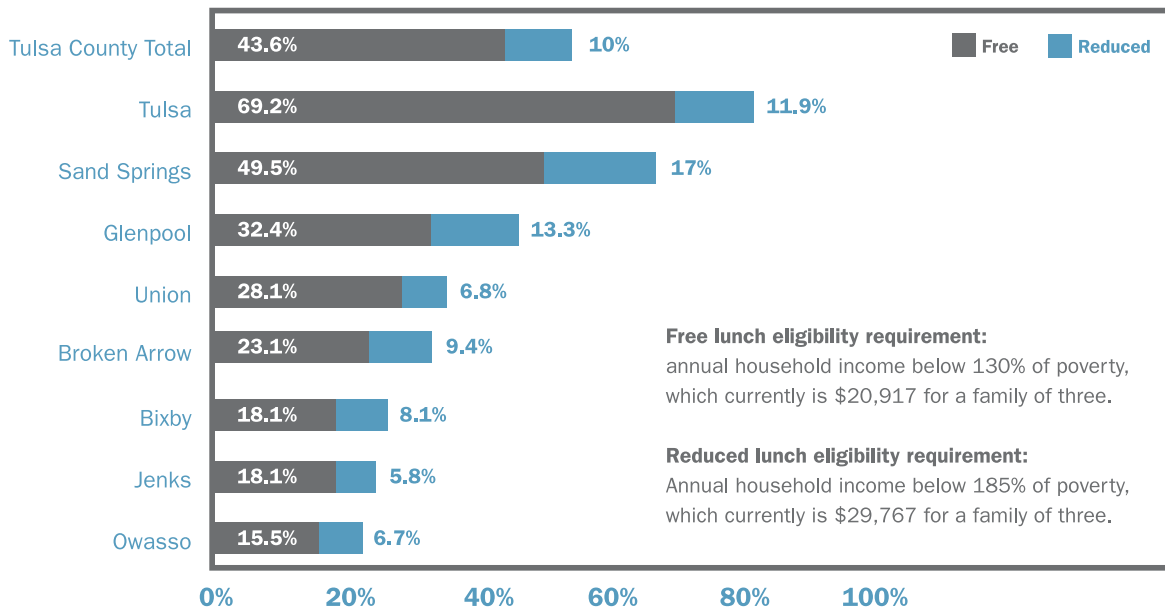


Source: Oklahoma State Department of Education, Data Services Alternative Education.  
Prepared by the Community Service Council of Greater Tulsa

## Large portion of elementary school students eligible for free and reduced lunch program in all area school districts

Free and Reduced Lunch Participation in Elementary Schools

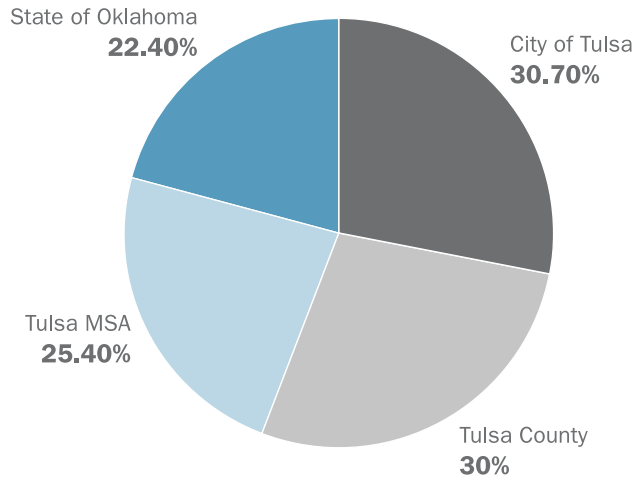
By School Districts, 2004-2005 School Year



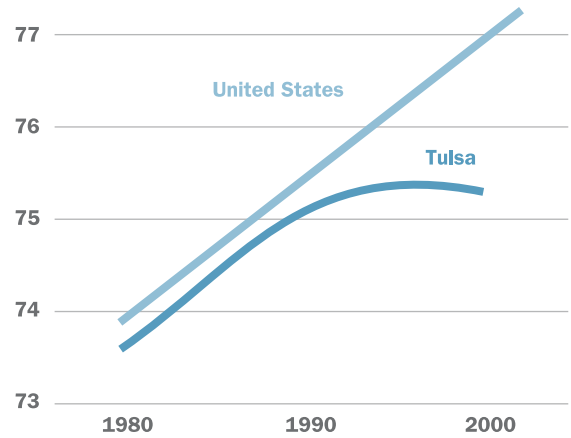
Source: Oklahoma State Department of Education, Low Income Report for 2004-2005.  
Prepared by the Community Service Council of Greater Tulsa

## People with Bachelors Degree

25 yrs old and older



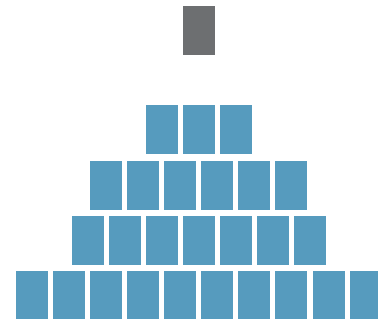
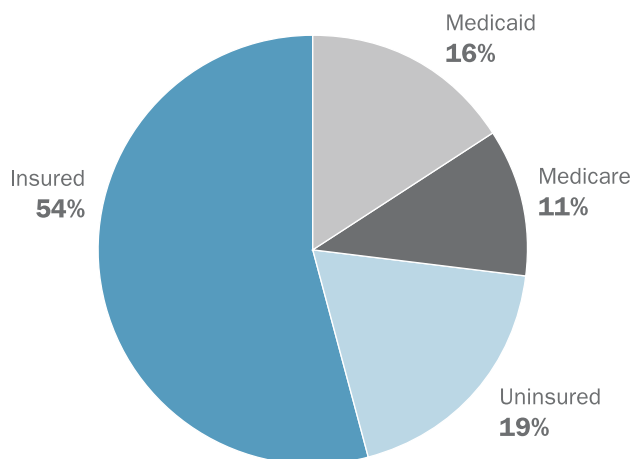
## Age-Adjusted Death Rate



While the lifespan of most U.S. residents is getting longer, the average lifespan of Tulsans is not – and the trend is going in the **wrong direction**

*Prepared as part of the Lewin Report*

## Health Care



For every 1 physician in north, east and west Tulsa, there are 26 in midtown and south Tulsa

*Prepared as part of the Lewin Report*

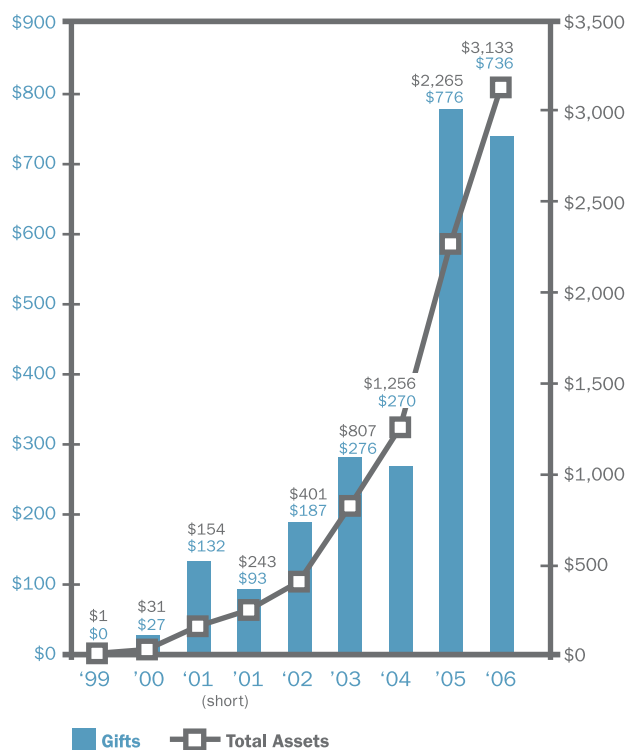
# TCF's Approach

TCF recognizes that by partnering with its several hundred donors and working alongside over 200 local not-for-profit organizations that this region can begin to right the trends that negatively affect our community.

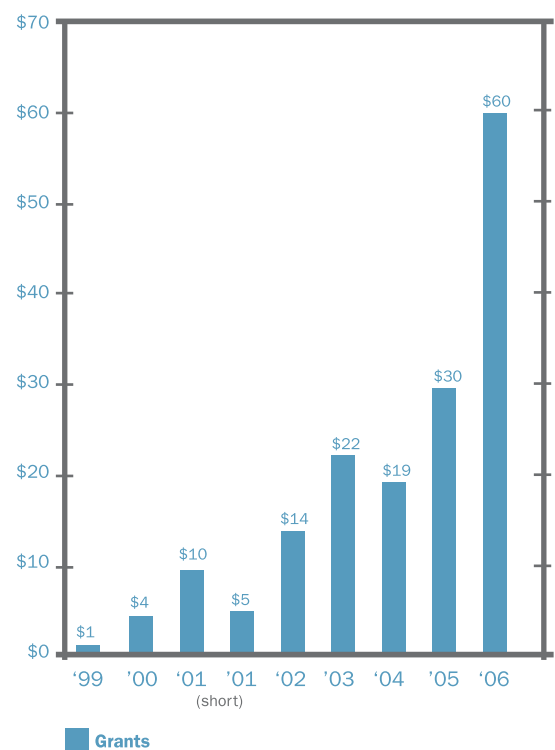
TCF is driven by the philosophy of charity with choice. Charity is sincere hope for the future, bolstered by actions taken in the present. Choice converts our hopes and dreams into focused action. If we are to make this great region even better, each concerned resident must be provided the opportunity and the process by which he/she can intelligently and tangibly give back to the community.

As the philanthropic assets given to TCF and the charitable grants awarded by TCF continue to increase each year, TCF is becoming the recognized community-owned organization that initiates, teaches and encourages personal and corporate charitable giving today so that the philanthropic needs of eastern Oklahomans can be met for all generations.

**Total Assets and Donations Received Consolidated (MM)**



**Grants Made Consolidated (MM)**





# TCF's TCF'S PROGRAMS Programs

## **2006-2007 Challenge Grant**

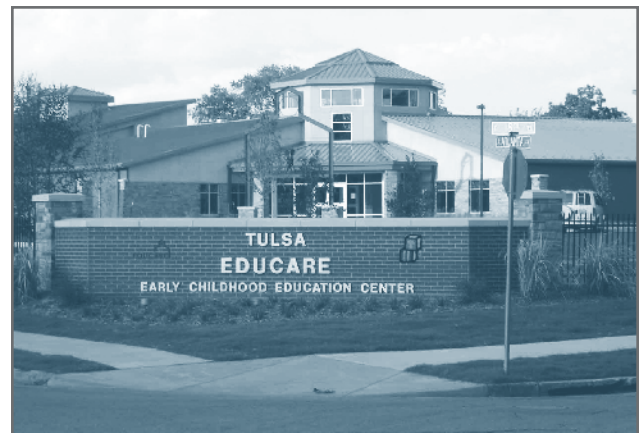
In 2006, due to the generosity of the George Kaiser Family Foundation, TCF launched its second challenge grant program. Although TCF's first challenge grant program matched current gifts, the 2006-2007 program rewarded not-for-profit agencies for securing planned gifts through bequests, life insurance policies, charitable remainder trusts, charitable gift annuities, IRA roll-overs and other planned giving instruments. In July and August 2006, TCF and its planned giving partner, The Advancement Group, presented a 4-part workshop on planned giving for 135 eastern Oklahoma not-for-profit agencies. Eighty (80) of those organizations applied for either a Starter-Kit grant (a \$2,500-\$5,000 grant that required no matching component) and/or a challenge grant. The Challenge Grant Program required agencies to solicit planned gifts, with the reward being a grant from TCF that was restricted for current operations. For example, an agency that set and achieved a goal of securing \$100,000 in planned gifts received a \$20,000 operating grant from TCF. In December 2006, TCF awarded 56 Challenge Grants with planned giving goals ranging from \$30,000 to \$200,000. In addition, TCF also awarded 45 Starter-Kit grants.

In January and March 2007, to assist Challenge Grant agencies to achieve their goals, TCF held two board seminars and two donor workshops where approximately 800 agency board members

and 125 donors learned about the Challenge Grant Program and planned giving techniques. By December 2007, 49% of the challenge grant agencies had met or exceeded its goal, raising a total of nearly \$7 million in planned gifts. The program concluded in early 2008.

## **Tulsa Educare, Inc.**

Tulsa Educare is a program dedicated to serving low-income children ages birth-5, in a state-of-the-art 30,000 square foot community center, providing educational, medical and social services for each child and family. In August 2006, the first Tulsa Educare site opened in the Kendall-Whittier neighborhood and currently serves 200 very low to low-income students and their families. Through its year-round schedule, mixed-age classrooms and degreed and certified staff, Tulsa Educare's success illustrates the importance of high quality early childhood education in our community. Parents play a large role in the success of the school as they volunteer in the classrooms, field trips or reading to the children. Parents can frequently be found discussing topics such as



health, stress, discipline, and nutrition with their child's teacher and with other parents. As a result of the school's early success, Tulsa Educare's Board of Directors has approved a new north Tulsa site near Hawthorne Elementary. In addition to building new sites, Tulsa Educare is committed to supporting the replication of its components in other early learning centers. By sharing best practices with other early learning centers, Tulsa Educare will help to ensure that more of Tulsa's children and parents can access high quality, effective early childhood learning opportunities.

#### **Partnership for the Availability of School Supplies (PASS)**

PASS seeks to alleviate the financial burden placed on low-income families to purchase school supplies. In 2000, TCF joined the existing effort of Community Action Project and the Charles and Lynn Schusterman Family Foundation to provide basic school supplies for elementary school students with the highest participation in the free lunch program. The cost for PASS supplies for the 2006-2007 school year was an average of \$8.35



per student; the same supplies would cost parents approximately \$44 to purchase individually. Supplies include crayons, pencils, pens, markers, glue, spiral notebooks, folders, 3-ring binders, rulers, scissors, cardboard school boxes, paper, and other essential supplies. In 2006, a total of 44 businesses, foundations, religious groups and individuals contributed to provide these essential school supplies to 19,709 students attending 49 Tulsa elementary schools and pre-K programs. In 2006, contributions to PASS increased from approximately \$103,000 to \$138,000 (a record 34% increase).

#### **Step Up Tulsa!**

Step Up Tulsa! has been a "call to action" for Tulsa and our region. Tulsa's philanthropic community initiated the planning process to ensure that, as a region, our local governments, our corporate sector and our philanthropic sector were maximizing resources by working together toward a common agenda.

Step Up Tulsa! brought together 150 community members from diverse professional sectors, geographic areas and ethnic backgrounds to research, discuss and identify critical issues to make the Tulsa area a successful 21st century region.

As a result of the learning, discussion and debate that took place, the following five initiatives were developed and are currently being implemented:

- By developing the Oklahoma Innovation Institute, the Tulsa area will host an entrepreneurship center, Tulsa Research Partners, the Community Innovation Fund and the Best Thinking Forum.
- Tulsa will become nationally-recognized as a healthy region by building specialty clinics in north and west Tulsa to increase access for underserved population centers and create effective prevention strategies to help keep all Tulsans healthy.
- Every student will graduate from high school prepared to pursue a 21st century career by spreading the impact of quality early childhood education and engaging families, educators and neighborhoods in developing Community Schools to help kids stay in school and succeed. Community Schools unite academics with families, school and community services to create a web of support that nurtures the development of children and adults.
- Tulsa will become an international destination known for its beautification efforts, urban development, vibrant gathering spaces and festivals that showcase Tulsa's international relationships and multicultural roots.
- The "Tulsans Have Pride Team" will interact with every initiative to build on our diversity as a community, brand a distinct and appropriate Tulsa identity and enhance civic participation.

Step Up Tulsa! has been led by committed and visionary leaders Jim Adelson of Nadel & Gussman and Sam Combs, III of ONEOK.

### **The Ultimate Gift Experience (TUGX)**

In 1999, a Tulsan by the name of Jim Stovall penned a book called *The Ultimate Gift*. Since that time, the book has sold over 3 million copies and has been published in 15 languages. The book was made into a major motion picture starring James Garner, Abigail Breslin, Drew Fuller and Lee Meriwether.

*The Ultimate Gift* carries a powerful message that answers questions the charitable community has asked for many years, "How do we assist families to pass on not only their financial assets but their value systems as well? How do we nurture and shape the next generation of charitably minded individuals, organizations and companies?"

In partnership with Henderson Financial Group and TruNorth, and with the support of 43 corporate and not-for-profit sponsors, Tulsa Community Foundation hosted a major motion picture World Premiere of *The Ultimate Gift*. In addition to the film's directors, two producers and 6 of its lead actors, over 1,800 area residents attended the world-class, Hollywood-style premiere. The premiere event included red carpet, actors, other celebrities, corporate receptions, live music, catered food and of course, free popcorn and soda during the movie. As participants were challenged by the Governor's office, Mayor Kathy Taylor, Jim Stovall and Phil Lakin to give back to their community in practical, tangible ways, the event reinforced and celebrated Tulsa's spirit of philanthropy.

### **Fund for Teachers (FFT)**

The Fund for Teachers (FFT) program enriches the personal and professional growth of teachers by recognizing and supporting them as they identify and pursue opportunities around the globe that will have the greatest impact on their practice, the academic lives of their students and on their school communities. Founded by Apache Corporation Chairman Raymond Plank, FFT provides fellowship grants directly to elementary and secondary teachers to support self-designed professional learning during the summer. In Oklahoma, FFT has worked in partnership with TCF and the Oklahoma Foundation for Excellence to award grants to 447 educators over the past 5 years. In 2006, \$428,575 in grants were awarded to 165 Oklahoma teachers for summer learning opportunities. These Oklahoma educators have implemented captivating fellowships that include:

- Visiting the literary landmarks of famous authors in England.
- Exploring the rainforest and ecosystems in Costa Rica.
- Attending a language arts institute at Columbia University.
- Participating in a teacher exchange program in Zimbabwe.
- Studying traditional Irish violin music in Ireland.
- Enhancing Spanish language skills in Spain.

Fund for Teachers is a non-profit organization that is supported by foundations, individuals, and corporate donors. Currently, donations are being received by TCF to endow this program; all donations are matched by FFT.



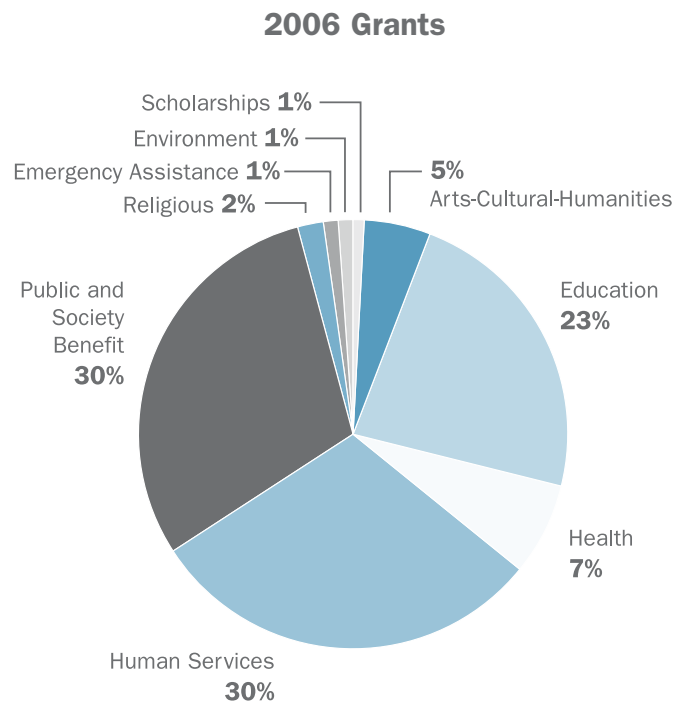
# Community Impact

Every year, Tulsa Community Foundation receives gifts of all sizes from individuals, foundations, not-for-profit organizations and corporations. Regardless of the size of the gift, the generosity and consideration of each donor reflect a passionate commitment to the enrichment of our community.

In addition to offering its donors prudent investment options, tax advantages and streamlined administrative services, TCF is committed to listening to its donors and assisting each to develop a unique charitable impact plan that aligns the donor's philanthropic vision and values with the needs of the community. Relying on its extensive community knowledge, TCF assists donors to fulfill their philanthropic vision through effective grantmaking.

As captured in the chart, TCF and its donors are contributing to a wide variety of charitable programs in eastern Oklahoma and the United States. In 2005, TCF distributed \$30.1 million in grants, yet in 2006, TCF's grants totaled more than \$49.4 million. While it is impossible to highlight every grant, TCF's donors were honored to support diverse organizations like the following: \$150,000 toward Tulsa Ballet Theatre, Inc.'s Exceeding Expectations capital campaign to convert storage space into new studios, build Studio K/Kivisto Hall and complete needed maintenance and improvements to its existing world-class facility; \$100,000 toward the Oklahoma History Center managed by Oklahoma

Historical Society; \$505,053 toward Tulsa Public Schools' HelmZar Leadership Challenge Course in north Tulsa; \$25,000 to enhance The Parent Child Center of Tulsa's treatment services; and \$10,000 to support YMCA of Greater Tulsa as it builds strong kids, strong families and strong communities through its Hutcherson facility.





# Why Give Through TCF

## WHY GIVE THROUGH TCF

Whether your passion is education, health care, youth development, arts and culture, the environment or something else, TCF can assist you in clarifying and accomplishing your charitable objectives.

Through its flexible fund structure, Tulsa Community Foundation offers benefits and solutions for every donor and charitable agency, including:

### **Convenience and Simplicity**

A fund takes little time to create. With direction from donors and an opening gift, TCF can establish a fund within the workday. The Foundation then provides all administrative services such as accounting, auditing, financial management, due diligence, grant making, and receipting. By assuming all administrative responsibility, TCF frees donors and nonprofits from paperwork, giving them time to take pleasure in the rewards of charitable giving.

### **Flexibility and Choice**

Each donor presents a distinctive vision of philanthropy. In response, TCF offers various types of funds to reflect the desired level of involvement. Donors may offer advice on grants made from the fund they create or entrust decisions to the Foundation. Donors may choose complete anonymity or full recognition for their gifts.

### **Grantmaking Assistance**

TCF connects donors with charitable organizations that correspond to their interests. The Foundation maintains strong links to hundreds of charities and nonprofit organizations, connections that assist donors in making informed decisions and in meeting their philanthropic goals.

### **Tax Advantages**

Since TCF is a public charity, its donors benefit from maximum allowable tax deductions and other advantages not available to private foundations. Upon making a gift, each donor receives an immediate and maximum allowable tax deduction. This deduction benefits the donor and simultaneously aids the community. Tax deductions increase the amount of money available for utilization by the community.

### **Professional Management**

Every asset invested with TCF is professionally managed according to the Investment Policy established by the Board of Trustees. Donors may choose among TCF's five investment pools which include the Conservative, Moderate, Moderate-Passive, Aggressive and Donor-Specific allocation strategies. Each fund benefits from being pooled and invested with the Foundation's total assets, resulting in lower management fees, greater investment diversification and reduced investment risks.

### **Public Accountability**

To ensure the quality and security of our operations, an independent, certified audit is performed annually and is available to any donor or person.

### **Philanthropic Assurance and Legacy**

Should the intended beneficiaries of a fund become obsolete, the Foundation will redirect the gift to charities with similar goals at the request of the donor. After the donor passes on, the donor's named successor advisors may provide advice to TCF. If there are no named successors, the Foundation's Board will continue to direct funds to accomplish the donor's original philanthropic intent.

## **Donor Advised Funds**

A Donor Advised Fund is an easy-to-establish, low cost, flexible vehicle for charitable giving that is an alternative to direct giving or creating a private foundation. With Donor Advised Funds, the donors receive an immediate tax deduction when they establish the fund. Donors are able to participate actively in the giving process by advising when and in what amounts to make gifts to the charitable organizations of their choice. TCF handles all accounting, reporting, investing and grantmaking.

## **Corporate Donor Advised Funds**

These funds are similar to Donor Advised Funds; however, the “donor” is a corporation instead of an individual. After making a donation to a Corporate Donor Advised Fund, the corporation may advise TCF concerning which charities to support and when to distribute funds. Corporate Donor Advised Funds keep a corporation from issuing numerous checks and maintaining multiple records for tax purposes, significantly reducing overall administration costs.

## **Charitable Agency Funds**

Charitable Agency Funds enable nonprofit organizations to receive annual distributions (currently 5.1%) from its permanent long-term reserve fund. The fund can provide a relatively constant source of income and demonstrate sound financial solvency and sustainability.

## **Field of Interest Funds**

This fund type allows a donor to make contributions to specific fields of interest that are important to them. By supporting, for example,

early childhood education or access to healthcare, a field of interest fund promotes the growth of numerous organizations within a donor’s specific area of interest.

## **Supporting Organizations**

These organizations attract donors with significant charitable assets and a desire to have a more formal giving structure. Supporting Organizations are separate entities affiliated with TCF and donors may appoint a minority of the governing board’s members. However, in order to maintain public charity affiliation, the majority of the board members in a Supporting Organization must be appointed by TCF.

## **Discretionary Funds**

By contributing to TCF’s Discretionary Fund, donors provide TCF with the flexibility to respond to the urgent needs and promising opportunities in our community now and in the years to come. After receiving a donation, TCF annually distributes a portion of the total value of the fund, providing grants that meet the most pressing community needs at that time.

## **Designated Funds**

Donors with ties to specific nonprofit organizations choose Designated Funds to ensure a successful future for the organizations. Upon the establishment of a Designated Fund, the donor (an individual, a corporation or an emerging not-for-profit group) designates specific charitable organizations as the perpetual recipients of the income and/or principal from the fund. Donors may not provide future advice.

### **Scholarship Funds**

With a Scholarship Fund, donors extend the legacy of philanthropy by assisting with various needs in education and training. Donors may establish a Scholarship Fund with specific selection criteria, such as the school, geographic area or field of study.

### **Transfer of a Private Foundation**

Over time, the original purpose of a Private Foundation may become obsolete or burdensome to its trustees. When transferring a Private Foundation to TCF, the capacity for action is maximized with each donation. With less time constraints, family or corporate members can concentrate on charitable work rather than administrative tasks.

### **Disaster Relief & Emergency Assistance Programs**

In 2005, realizing that disaster can strike anytime, TCF launched the first of its Employee Disaster Relief and Emergency Assistance programs in partnership with Dollar Thrifty Automotive Group. Since that time, TCF has created and managed programs for other companies such as Bama, T.D. Williamson, Samson Investment Company, Kaiser-Francis Oil Company, Cox Communications and QuikTrip. TCF's Disaster Relief programs are dedicated to helping the companies' employees in the event of an unexpected or unavoidable emergency or disaster. Since April 2005, TCF assisted its corporate partners in providing \$548,597 of short-term, immediate assistance to nearly 600 employees.





# Ways to Give

Tulsa Community Foundation believes that every person plays an important role in improving the quality of life in a community. Our partners implement their philanthropic plans through various means of charitable giving. Due to our flexibility and expertise, TCF has the capacity to accept assets of almost any kind, including:

**Gifts of Cash**

**Gifts of Publicly Traded and  
Privately-Held Securities**

**Gifts of Real Estate**

**Gifts of Tangible Property**

**Gifts of Life Insurance**

**Gifts of an IRA Account**

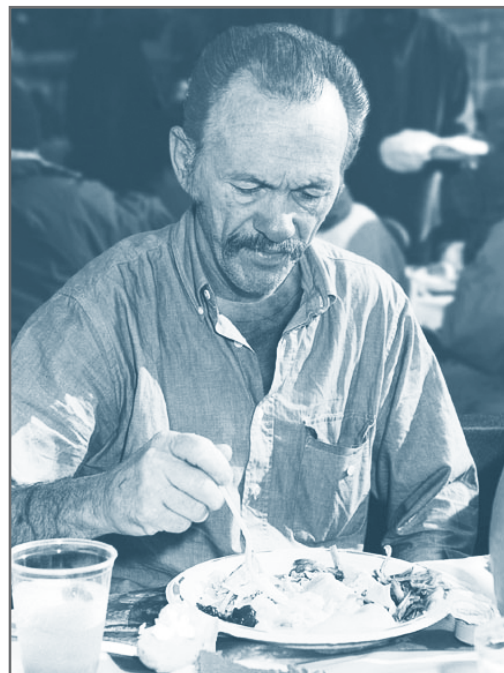
**or IRA Minimum Distribution**

**Charitable Bequests**

**Charitable Remainder Trusts**

**Charitable Lead Trusts**

**Charitable Gift Annuity**



# Donor Profiles

## DONOR PROFILES

### **Joe and Patty Cappy - Investing Your Assets and Yourself To Improve Lives**

As former Chairman and CEO of Dollar Thrifty Automotive Group, Joe Cappy understands the importance of efficiency and effectiveness.

Together, Joe and his wife Patty have developed a giving plan that aligns their philanthropic vision, personal values, and unyielding passion.

Although the couple previously managed their philanthropy through a Fidelity Charitable Trust Fund, they moved their charitable assets to a Donor Advised Fund at Tulsa Community Foundation because, as Joe says, “We saved significantly on administration fees, got better returns and improved reporting.” Joe and Patty invest in diverse community efforts, favoring youth activities like the Girl Scouts and Boy Scouts

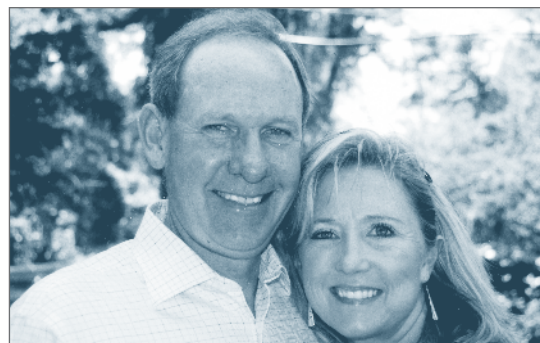
where Joe and Patty have served as the Presidents of the Board. They also strongly support the Gilcrease and Philbrook Museums, The Tulsa Area United Way (TAUW), ORU, TU and various religious organizations. As Joe replies when asked about how he developed his philanthropic interests, “My service with the TAUW, and as Campaign Chair in 1999, allowed me to visit all of the associated agencies at that time (69 agencies). I was able to see how these social and health services provided a needed safety net for the community.” With a focus on the future, Joe and Patty have been able to leverage their time, experiences, and resources to promote youth development, the arts, education, and the strengthening of Tulsa’s social service safety-net.



### **Phil Smith - Measuring philanthropy one life at a time**

Phil Smith, former CEO of Prize Energy Corp. and Tide West Oil Company, has spent his working career evaluating business opportunities, understanding market conditions, building strategic alliances and launching a number of successful business ventures in the oil and gas industry. But in 2002, Phil began a second career of what he calls “purposeful living.” Following the advice of Os Guinness who says, “Doing the right thing at the right moment multiplies its effect incalculably,” Phil’s current career objective is to “enable at least one million people to raise themselves out of poverty.” As he writes in a

recent book he co-authored, *A Billion Bootstraps: Microcredit, Barefoot Banking and the Business Solution for Ending Poverty*, “Innovation is a key to improving the lives of others. With skill, imagination and relentless pursuit, effective new solutions can be found.” Focusing his philanthropy on “the cost-per-life changed (CPL),” Phil utilizes the same skills that helped his business ventures achieve high returns to evaluate charitable programs and the impacts these programs have on people. Through their partnership with Tulsa Community Foundation and as a result of CPL-driven venture philanthropy, Phil and his wife Shannon have discovered “how joy and generosity can come together to enrich the lives of everyone involved.”



# *Donor Advised Funds*

## D O N O R   A D V I S E D   F U N D S

### **DONOR ADVISED FUNDS:**

David and Carol Adelson Family Foundation Fund  
James and Susannah Adelson Family Foundation Fund  
Julie and Tom Adelson Family Fund  
Robert and Marta Adelson Family Foundation Fund  
Thomas and Julie Adelson Family Foundation Fund  
Adelson Family Foundation Fund  
Allen Family Foundation Fund  
Angels for Others Fund  
Beattie Family Fund  
Bekah's Helping Paw Fund  
Jack and Linda Bell Education Fund  
Stephen Berlin Family Fund  
Vera Berlin Fund  
Bezalal Fund  
Walter E. & Dorothy Biery Charitable Fund  
Adele & Rolf Blom Fund  
Boylan Family Foundation Fund  
Gary L. and Nancy A. Bracken  
Charitable Endowment Fund  
California Girls Fund  
Joseph E. and Patricia D. Cappy Fund  
Cardin Family Tzedaka Fund  
Chanel Charitable Fund  
Barry and Karen Davis Family Charitable Fund  
Lee H. Davis Family Charitable Fund  
Mark and Janie Davis Charitable Fund  
Timothy S. Davis Family Fund  
Davis Family Fund  
DEBARK Fund  
Dunkin Family Charitable Fund  
Robert and Esther Endres Charitable Fund  
Kenneth and Patricia Fike Charitable Fund  
Frank Family Foundation Fund  
Patrick V. and Estella M. Franken Fund  
Phil and Jana Frohlich Fund  
Furman Family Charitable Fund

J. & M. Gaberino Family Charitable Fund  
Hall Family Philanthropic Fund  
Gerald and Sharon Heller Family Fund  
Hopeman Family Philanthropic Fund  
Hurtle Family Philanthropic Fund  
Stephen E. and Shelley S. Jackson  
Family Foundation Fund  
Ron and Myra Jeffris Fund  
David and Susan Johnson Family Fund  
JVR Fund  
Kach Family Charitable Fund  
Betty E. and George B. Kaiser Foundation Fund  
Betty Kaiser Memorial Fund  
George B. Kaiser Family Fund  
George Kaiser Family Foundation Fund  
Herman George Kaiser Fund  
Tom and Julie Kivisto Fund  
Kneale Family Fund  
Deena J. Kutcher Memorial Fund  
David and Tracy Kyle Fund  
Jeanne M. and Robert J. LaFortune Fund  
Phil and Adriane Lakin Fund  
Phil and Jan Lakin Charitable Fund  
Langdon Publishing Fund  
Levit Family Charitable Fund  
Sidney W. and Mary Lieberman Fund  
Jack Andrew Lollar Fund for Children  
Kristin M. Lowe Fund  
Stan and Marcia Lybarger Fund  
John and Lee Major Fund  
Lowell Marchant Fund  
The Paul W. and Lilah B. Marshall Fund  
Paula Marshall Fund  
Lynn and Gary Martin Charitable Fund  
Joseph L. and Nancy N. McDonald Fund  
Don and Donna Millican Fund  
Marshall E. and Anna L. Milligan Fund

Mittapalli Donor Advised Fund  
 Mike and Leslie Moore Charitable Fund  
 Elizabeth B. Mulford Fund  
 Vincent and Rosamond "Posy" Mulford Fund  
 Annette and Kevin Murray Family Fund  
 Renee F. Neuwald Foundation Fund  
 Newman Family Foundation Fund  
 R. Kelly Norman Memorial Fund  
 Joe Parker Fund  
 Phi-Le-Em Fund  
 Mona Pittenger Foundation Fund  
 Q Club of Tulsa Fund  
 Mike and Jean Quinn Family Foundation Fund  
 Bernard and Marcy Robinowitz Family Fund  
 Sol Robinowitz Family Fund  
 Edwin and Phoebe Schermerhorn Fund  
 Schlafke Family Fund  
 Joseph R. Schulte Fund  
 Virginia C. Schulte Fund  
 Charles and Lynn Schusterman Family Foundation Fund  
 Serendipity Fund  
 Mohammed Osman Sheikh Foundation Fund  
 Shelton Family Fund  
 Richard and Norma Small Charitable Fund  
 David Cornelius Sneed Charitable Endowment Fund  
 Thomas Montgomery Sneed Charitable Endowment Fund  
 John Hunt and Elizabeth Sneed Sparks Charitable Fund  
 Stephenson Family Foundation Fund  
 David H. and Kathy J. Stevens Family Fund  
 Bruce and Linda Stoesser Charitable Fund  
 Robert and Jill Thomas Charitable Fund  
 William F. and Susan W. Thomas Charitable Fund  
 William Robert Thomas Charitable Fund  
 Jim and Carol Thompson Fund  
 Tucky's Tree Fund

Urban Angels Fund  
 Annie and Jeff Van Hanken Fund  
 Russ and Donna Vanderslice Charitable Fund  
 Welch Family Donor Advised Fund  
 Wells Family Charitable Fund  
 Emily and Phil Wood Fund  
 Wood River Fund  
 Robert N. Yaffe Family Fund  
 YP Tulsa Fund  
 Anne and Henry Zarrow Family Fund  
 Henry Zarrow Fund  
 Maxine and Jack Zarrow Family Fund

**CORPORATE DONOR ADVISED FUNDS:**

Bama Companies Fund  
 Bama Reserve Fund  
 BOKF Foundation Fund  
 CITGO Foundation Fund  
 Cox Connects Foundation Fund  
 Dollar Thrifty Automotive Group Fund  
 Dollar Thrifty Neighbors Together for Schools Fund  
 Helmerich & Payne Fund  
 Nadel and Gussman Energy Fund  
 ONEOK Foundation, Inc. Fund  
 QuikTrip Corporation Fund  
 Samson Fund  
 SemGroup Foundation Fund  
 Verizon Community Relations Fund  
 Williams Art Education Fund  
 Williams Companies Fund

# Corporate Donor Profiles

## CORPORATE DONOR PROFILES

### **Williams Companies – Protecting the Community and Promoting Philanthropy**

Desiring to more closely collaborate with Tulsa Community Foundation and other local funders on important, sustainable projects that improve the Tulsa region, Williams created a corporate donor advised fund in 2000. Throughout its nearly 100 years of producing, gathering, processing and transporting clean-burning natural gas to heat homes and power electric generation across the country, Williams has firmly demonstrated a responsibility to the communities it serves and a commitment to protecting the public, the environment and our nation's natural resources. Beyond its corporate commitment, Williams strongly encourages its workforce to invest their time, talents, and resources by serving on not-for-profit boards and volunteering with local community agencies.

In addition to strongly supporting the Tulsa Area United Way and its United Way Teens' Way leadership development program, Williams proudly supports public schools through its Adopt-a-School campaign. Designed to meet specific goals within each school, employees participate in mentoring, provide supplies for needy students and work to meet the specific needs of the students. Through its donor advised fund, Williams also supports numerous other arts and culture, education, health, and human services agencies working to improve the lives of young people and their families.

In an effort to enhance Tulsa's art community and further art education, Williams partnered with Tulsa Community Foundation, SemGroup, The Kivisto Family Foundation, the Bank of Oklahoma and Tulsa's young professional organizations to create the Tulsa Art Sampler, a unique opportunity to witness some of Tulsa's finest arts and to get to know artistic directors, board members and other young professionals that help create Tulsa's dynamic art scene. Proceeds from the Tulsa Art Sampler are used to support art education grants benefiting area schools. Raising more than \$50,000 in the last two years, Williams and its Tulsa Art Sampler partners have enriched the lives of thousands of local students.





# Corporate Donor Profiles

## CORPORATE DONOR PROFILES

### **QuikTrip – Guaranteed Philanthropy**

In late 1998, George Kaiser approached Chester Cadieux, the former president and chairman of QuikTrip, to consider how a partnership with TCF could assist the growing convenience store chain to effectively accomplish its charitable objectives. After investigating its options, QuikTrip created one of the Foundation's first supporting organizations and corporate donor advised funds.

Committed to investing strongly in the communities it serves, QuikTrip annually distributes 5% of its net profits to eligible not-for-profit organizations. Driven by the mission "to wisely invest dollars in community efforts that will help impact (in measurable terms) individuals in [their] society who are dependent on the charitable support of others," QuikTrip invests its charitable dollars and volunteer time in strategic efforts that help those who are at-risk reach their capacity as successful, independent citizens. QuikTrip manages its philanthropy like it does its stores, with a focus on long-term results that leverage and compound its original investment. Just as its gasoline is guaranteed to maximize your car's output, through its support of the national Safe Place project and local organizations such as the Youth Services of Tulsa, Child Abuse Network, Emergency Infant Services, Tulsa Autism Foundation, Salvation Army, Kendall Whittier Inc., Tulsa Educare, Tulsa Day Center for the Homeless, Rosa Parks Elementary School, Tulsa Public Schools, Mental Health Association, and many others, QuikTrip and its employees are making a measurable impact in the areas of at-risk youth and early childhood education.



# *Donor* **D O N O R   D E S I G N A T E D   F U N D S** *Designated Funds*

## **DONOR DESIGNATED FUNDS:**

Barthelmes Trust Endowment Fund for the Tulsa

Philharmonic Society, Inc.

Barthelmes Trust Endowment Fund for the

Tulsa Youth Symphony

Bristow Community Capital Needs Fund

Capacity Building Fund

Child Protection Coalition Fund

Close Up Fund

Rosalind Cook Artistic Encouragement Award Fund

Dolinsky Family Fund

Educare OKC Fund

Five Museum Regional Campaign Fund

Fund for Teachers Fund

Get Fit Tulsa Fund

Global Gardens Fund

Healthy Paseo Fund

Herron Foundation Fund

HOPE Foundation for Children with Autism and

Other Related Disorders Fund

Kendall-Whittier Neighborhood Needs Fund

Levit Prizes for Excellence in the Arts Designated Fund

Maple Ridge Neighborhood Park Fund

Benjamin S. Patrick Pastoral Care Fund

Pediatric Healthcare Fund

QT Educare Fund

Race Riot Fund

Donald W. Reynolds Counseling Services Fund

C.L. Richards Foundation Fund

Southminster Presbyterian Church Designated

Capital Campaign Fund

Dan Stamper Memorial Fund

Tulsa Autism Foundation Fund

Tulsa Ballet Bradstreet Fund

Tulsa Benefits Fund

Tulsa Community College Designated Fund

Tulsa Educare Enhancement Fund

Peter M. Walter Gilcrease Museum Fund

Zarrow-Plank Fund for Teachers Fund

# Scholarship and Hardship Funds

## SCHOLARSHIP AND HARDSHIP FUNDS

### SCHOLARSHIP FUNDS

Cox Connects Foundation Scholarship Fund  
Dollar Thrifty Road Scholars Fund  
HEAP Scholar Award Fund  
Terry Hessong Memorial Scholarship Fund  
Knowledge is Golden  
Murphy Family Scholarship Fund for Teachers  
OK/Assist Fund  
Senator Bob Dole Honorary Scholar Award Fund  
Don and Pam Sherrer Scholarship Fund  
Dan Stamper Scholarship Fund  
SouthCrest, LLC Scholarship Fund

### EMERGENCY ASSISTANCE AND HARDSHIP FUNDS

BamaAid Emergency Assistance Fund  
Larry W. Brummett Foundation Fund  
CITGO Disaster Relief Fund  
Dollar Thrifty Employees Disaster Relief Fund  
Dollar Thrifty Hurricane and Disaster Relief Fund  
Kaiser-Francis Oil Company Employee Assistance Fund  
QuikTrip Cares Employee Disaster Relief Fund  
Samson Employee Emergency Assistance Fund  
The Spirit Network Community Fund  
T.D. Williams LifeTAPP Fund  
Tulsa Educare Benevolence Fund





## LIFE Senior Services

With a mission to provide information, education, and services that promote independence, quality of life, and dignity for older adults and caregivers in northeastern Oklahoma, LIFE Senior Services (LIFE) has a rich history of providing the highest quality services, developing new directions for service delivery, and responding to the needs of seniors and caregivers with initiatives that expand the continuum of community-based services since 1973.

Serving more than 25,000 seniors and their families annually, LIFE offers the following primary programs and services:

SeniorLine information and referral; Adult Day Services at three locations in Tulsa and Broken Arrow; comprehensive (ADvantage and Independent) case management; caregiver support; community education; two senior centers; Vintage publications (*The Vintage Newsmagazine* and *The Vintage Guide to Housing and Services*); Medicare Part D assistance; and *Vintage Housing*.



For 25 years, LIFE's three CARF accredited centers in Broken Arrow and Tulsa have provided nationally-recognized adult day services, offering a safe, daytime home for adults who have a physical impairment, Alzheimer's disease or other dementia, mental health disorder, or developmental disability, or who are socially isolated. LIFE's three centers are the only centers in Oklahoma accredited by the Commission on Accreditation of Rehabilitation Facilities. LIFE's Medicare Prescription Assistance Coalition helps Medicare beneficiaries in 17 counties of northeastern Oklahoma navigate the maze of more than 60 Medicare Part D options. This coalition of public and private partners has provided information, education, and enrollment assistance to more than 21,500 Medicare beneficiaries. A front-page *New York Times* article highlighted LIFE's work in this area.

Over the last 11 years, Vintage Housing, a non-profit affiliate of LIFE, has developed more than \$35 million in twelve affordable housing complexes for seniors and has received numerous regional and national awards. LIFE is currently developing plans to establish the first affordable assisted living housing complex in eastern Oklahoma.

LIFE was one of the first agencies to create an agency fund at TCF. LIFE has participated in both Challenge Grant programs offered by TCF, raising approximately \$280,000 in current and planned gifts and receiving approximately \$60,000 from TCF in matching grants.

## **DREAM Institute**

The Disability, Resources, Educational Advocacy, Motivation (DREAM) Institute was formed in March of 2002 by co-founders Kristy Long and Rodney Bryan Pratz. The DREAM Institute is dedicated to assisting students with disabilities ages 17-21 achieve their post-secondary and career aspirations. The inspiration for DREAM Institute's comprehensive model of financial assistance, tutoring, and career mentoring comes from Kristy's and Rodney's own battle to overcome their disabilities.

The Institute officially launched its programs and initiatives on November 13, 2003. Through a fiscal sponsorship agreement with TCF, the Institute was able to begin providing services while it applied for its own 501(c)(3) designation. Because of generous seed funding from area individuals and foundations and the administrative support of Tulsa Community Foundation, the Institute was able to implement the necessary infrastructure and programs to award its first six scholarships in June of 2004. To date, DREAM Institute has awarded nineteen scholarships. Each scholar receives a four-year scholarship, as well as other tutoring and mentoring services.

The Institute works with each scholar to develop an education and career path that utilizes and focuses on the student's unique strengths and passions. Then, the Institute connects the scholar to career mentors and academic tutors. Through the mentorship program, scholars become self-reliant, self-determined, and successful in their careers.

In addition to its academic assistance, tutoring services and mentoring program, the Institute continues to raise awareness in communities across Oklahoma that students with disabilities are just as capable of achieving success. Boasting strong GPAs and significant community involvement, The DREAM Institute's scholars continue to demonstrate that, with the proper support, all students can succeed in and out of the classroom.



## IMSI

TCF's service boundaries extend all across eastern Oklahoma, even to its southeast corner, where fifteen organizations from McCurtain County have affiliated with TCF as part of the McCurtain County Community Fund. One organization from McCurtain County is the Idabel Museum Society (IMSI). IMSI is the support organization for the City of Idabel's Museum of the Red River, which opened to the public in 1975. It was originally founded by local business owners and civic leaders to serve as an exhibiting facility for archaeological materials that were being recovered by various federal and state agencies during major construction projects in southeast Oklahoma. After a few years, the Museum itself sponsored archaeological recovery projects, and also acted as a contractor for several government agencies. Its original 2,000 sq. ft. facility has since grown to over 21,000 square feet, making the Museum of the Red River the largest exhibiting arts facility for nearly 200 miles in every direction.

The Museum's 18,000 piece collection now includes the regional archaeological materials plus ethnographic works from throughout North, Central and South America. Smaller holdings of works from Africa, East Asia and the South Pacific allow for comparative examinations of material culture. The Museum also houses the cast skeleton of *Acrocanthosaurus atokensis*, Oklahoma's state dinosaur. The Museum broke ground in the fall of 2007 for a 10,000 sq. ft. addition that will provide improved public education and community-use space. Idabel Museum Society's participation in Tulsa Community Foundation's recent Challenge Grant program enabled the museum to secure \$20,000 for planning the new facility, and raised over \$100,000 in endowment monies to support the new facility.



# Charitable Agency Funds

## AGENCY FUNDS:

12 & 12 Fund

12 & 12 Reserve Fund

2008 National Preservation Conference Reserve Fund

A New Leaf Endowment Fund

AFP Education Fund

Alcott Elementary School Discretionary Fund

Alzheimer's Association Fund

American Red Cross - Tulsa Endowment Fund

Animal Rescue and Kare Fund

Arms Around BA Endowment Fund

Arthritis Foundation EOC Investment Fund

Arts & Humanities Council Endowment Fund

Associated Centers for Therapy Endowment Fund

Bartlesville Civitan Accessible Park Fund

Battiest School and Community Fund

Behavioral Services, Inc. Endowment Fund

Betty Kaiser Library Literacy Fund

Big Brothers Big Sisters of Oklahoma Fund

Booker T. Washington High School Foundation  
Endowment Fund

Brady Heights Neighborhood Association  
Endowment Fund

Bridges Foundation Fund

Broken Arrow Neighbors Endowment Fund

Broken Bow Education Fund

The Center Endowment Fund

Cherokee County/Cherokee Nations C.A.S.A.  
Endowment Fund

Cherokee National Historical Society, Inc. Fund

Child Abuse Network Endowment Fund

Child Care Resource Center Fund

Children's Center Foundation Fund

Clarehouse Fund

Community Action Project Children's Fund

Community Food Bank of Eastern Oklahoma  
Endowment Fund

Community Food Bank of Eastern Oklahoma  
Operating Fund

Community Health Foundation Fund

Community Service Council of Greater Tulsa, Inc.  
Endowment Fund

Consumer Credit Counseling Services Fund

Crossroads Fund

Dillon International, Inc. Fund

Domestic Violence Intervention Services Fund

Double J. Ranch Reserve Fund

DREAM Institute Academic Assistance Fund

DREAM Institute Endowment Fund

DREAM Institute Fundraising Fund

E.O.D.D.S. Endowment Fund (Eastern Oklahoma  
Donated Dental Services)

Emergency Infant Services Endowment Fund

E.T. Dunlap Foundation Fund

Family and Children's Service Program Fund

Family Care Services Endowment Fund

Fellowship of Christian Athletes Endowment Fund

FHC Fund

Fitting Back In Fund

Foundation for Tulsa Schools Endowment Fund

Friends of Beaver Bend Fund

Gay and Lesbian Fund for Tulsa

Girl Scouts Magic Empire Council Endowment Fund

Good Samaritan Health Services Endowment Fund

Goodwill Industries of Tulsa Fund

Grace K. Cousins Scholarship Fund

Greeley Elementary School Discretionary Fund

Guild of Tulsa Opera Endowment Fund

Habitat for Humanity Endowment Fund

Happy Hands Education Fund

Dr. Mark A. Hayes Faculty Development Fund

Henryetta Historical Society Fund

Heritage Family Services Endowment Fund

Hospice of Green Country, Inc. Fund

Huksak Engineering Scholarship Endowment Fund

Human Skills and Resources Fund

Idabel Academic Fund

Idabel Chamber Fund

Idabel Kiwanis Club Fund	Neuro-Science Research Foundation Reserve Fund
Idabel Lions Club Scholarship Fund	New Life Ranch Hope Endowment Fund
Idabel Rotary Fund	Nowata Educational Endowment Foundation Fund
IMSI Fund	Oasis Adult Day Services Endowment Fund
Indian Health Care Resource Center of Tulsa Fund	OCCJ Fund
Indian Nations Council Fund	OCCJ Different and the Same Endowment Fund
Iron Gate at Trinity Fund	OkEq Capital Campaign Fund
John 3:16 Mission, Inc. Endowment Fund	Oklahoma Brain Tumor Foundation Fund
Junior Achievement of Eastern Oklahoma Fund	Oklahoma Caring Foundation Fund
Junior League of Tulsa Endowment Fund	Oklahoma Center for Nonprofits Fund
Kendall-Whittier Elementary School Reserve Fund	Oklahoma Christian University Fund
Kendall-Whittier, Inc. Endowment Fund	Oklahoma Humanities Council Endowment Fund
Kendall-Whittier, Inc. Youth Endowment Fund	Oklahoma Partnership for School Readiness Foundation, Inc. Endowment Fund
Key to Hope Endowment Fund	Oklahomans for Equality Fund
Key to Hope Owen Trust Fund	Okmulgee County Family Resource Center Endowment Fund
Kiwanis Club of Tulsa Southeast Fund	Operation Aware of Oklahoma, Inc. Fund
Leadership Tulsa Fund	Oxley Nature Center Endowment Fund
League of Women Voters of Metropolitan Tulsa Fund	Parent Child Center of Tulsa Fund
Legal Aid Services Oklahoma Fund	Partnership for the Availability of School Supplies (PASS) Endowment Fund
LIFE Senior Services Fund	Planned Parenthood Endowment Fund
Little Light House Endowment Fund	Planned Parenthood Reserve Fund
Lollipops and Rainbows Endowment Fund	RARC Endowment Fund
M.S.N.I. Fund	Reaching Hands Development Fund
Make-A-Wish Foundation of Oklahoma Fund	Rebuilding Together Tulsa Endowment Fund
Margaret Hudson Building Endowment Fund	Resonance Listening and Growth Fund
Margaret Hudson Operating Endowment Fund	Restore Hope Ministries Endowment Fund
Mark Iola Scholarship Fund	Riverfield Endowment Fund
McCurtain Community Fund	Robert S. Rizley Opera Education Endowment Fund
McCurtain County Boys & Girls Club Fund	Rocky Mountain Philatelic Library Fund
Meals on Wheels of Metro Tulsa Endowment Fund	Rogers County Volunteers for Youth Endowment Fund
Mental Health Association in Tulsa, Inc. Fund	Rogers County Youth Services Endowment Fund
Metro Christian Academy Foundation Fund	Rotary Club of Bixby Fund
National Indian Monument & Institute Fund	Salvation Army Endowment Fund
National Wrestling Hall of Fame Endowment Fund	Sherwin Miller Museum of Jewish Art Challenge Fund
Neighbor for Neighbor Fund	
Neighbors Along the Line Find	
Neuro-Science Research Foundation, Inc. Fund	

Simon Estes Educational Fund	Tulsa Metropolitan Ministry Endowment Fund
South Grand Lake Meals on Wheels Endowment Fund	Tulsa Opera Fund
Southern Hills Baptist Church Memorial Foundation Fund	Tulsa Partners Endowment Fund
Special Olympics Oklahoma Fund	Tulsa Police Officers' Memorial Fund
Stand In The Gap Endowment Fund	Tulsa Project Woman Endowment Fund
Street School Endowment Fund	Tulsa Reaches Out Fund
TARC Endowment Fund	Tulsa Repertory Theatre Endowment Fund
Teen Challenge of Oklahoma Fund	Tulsa Youth Symphony Fund
TESCOT Endowment Fund	Tulsa Zoo Friends Fund
Theater Arts Productions Endowment Fund	Undercroft Montessori School Endowment Fund
Therapeutics Service Dogs Fund	United Christian Giving Fund
Tom Action Community Fund	University of Tulsa Presidential Scholars Endowment Fund
Town and Country School, Inc., Fund	University of Tulsa University School Endowment Fund
Tri-County CASA Fund	Up With Trees, Inc., Fund
Trinity Episcopal Day School Endowment Fund	Vian Community Charitable Trust Endowment Fund
TSHA Fund	Vinita Public Schools Educational Foundation Gatlin/FFA Trust Fund
Tulsa Air and Space Center Endowment Fund	Vinita Public Schools Educational Foundation General Fund
Tulsa Area United Way - Bailey Endowment Fund	Vinita Public Schools Educational Foundation Goodpaster Trust Fund
Tulsa Area United Way Endowment Fund	Visiting Nurse Association Fund
Tulsa Area Youth Symphony Endowment Fund	Volunteers of America (Tulsa) Endowment Fund
Tulsa Ballet Fund	WoHeLo Trust Fund
Tulsa Boys' Home Endowment II Fund	Wright City Schools Foundation Fund
Tulsa C.A.S.A.	YMCA of Greater Tulsa Endowment Fund
Tulsa Cerebral Palsy Endowment Fund	Youth at Heart Fund
Tulsa County Medical Society Community Development Fund	Youth Services of Tulsa Endowment Fund
Tulsa Day Center for the Homeless Endowment Fund	YWCA of Tulsa Endowment Fund
Tulsa Day Center for the Homeless Capital Needs Reserve Fund	YWCA of Tulsa North Endowment Fund
Tulsa Educare Designated Fund	
Tulsa Educare Very Early Childhood Slot Fund	
Tulsa Engineering Foundation Endowment Fund	
Tulsa Global Alliance Endowment Fund	
Tulsa Historical Society Fund	
Tulsa Lawyers for Children, Inc. Endowment Fund	
Tulsa Library Trust: Library Books for Children Fund	
Tulsa Metropolitan Citizens Crime Commission Fund	



### Joe and Carol McGraw: Gifting a Legacy

Having spent their lives engaged in public service, Joe and Carol McGraw have deep roots in this community. Joe has served in the Oklahoma House of Representatives and the Oklahoma Senate, on numerous boards, commissions and associations such as the University of Tulsa, Cascia Hall, Botanical Gardens, Oklahoma Aquarium, Tulsa Board of Realtors Foundation, and NatureWorks. Carol was a founding member of Brush Creek Youth Ranch and has served on multiple boards such as Tulsa Boys Home, American Lung Association, G.M. Sutton Avian Research Center, Mental Health Association of Tulsa's Advisory Board, and the Mayor's Environmental Advisory Council. Driven by their desire to share their blessings by giving back to the less fortunate, Joe and Carol exemplify Tulsa's philanthropic spirit.



Unlike many first time donors who wish to streamline their annual giving, Joe and Carol's first interaction with TCF involved a comprehensive estate plan. The couple had a dream – to create a nonprofit retreat center that would serve the charitable community for generations to come. This center would offer a natural setting for non-profit staff and board members to hold meetings and strategic planning sessions, and a place to reflect upon their philanthropic mission. Thanks to the efforts of the McGraw family's attorney and to TCF, this dream will become a reality.

Upon the event of their deaths, Joe and Carol's 19-acre estate will be gifted to TCF and will be named the Joe and Carol McGraw Retreat Center. The property -- currently consisting of a main house, newly-built guest house, Normandy-style log barn and event space, large garage and artist's loft, pool, pond, two territorial swans, and a huge tree swing -- will continue to be used for community events, weddings and the annual Brush Creek Youth Ranch bazaar. The revenue from these types of events and a \$1 million endowment will ensure that the retreat center will be able to offer subsidized rates to area not-for-profit organizations wishing to use the retreat center. With plans for adding bathroom facilities in the barn and a chapel overlooking the property, Joe and Carol are not finished dreaming of the legacy they will leave, a legacy that will help ensure that local non-profit agencies are prepared to more effectively meet the needs of future Tulsans.

When asked about the importance of investing one's time and resources in the community, Carol simply said, "It does not matter how much you give, but that you give."

# *Supporting Organizations*

## SUPPORTING ORGANIZATIONS

### **SUPPORTING ORGANIZATIONS:**

BOKF Foundation  
Brock Family Community Foundation  
George Kaiser Family Foundation  
Morningside Health Care Foundation  
Mona Pittenger Foundation  
QuikTrip Corporation Community Foundation  
Stephenson Family Foundation  
Tulsa Beautification Foundation  
Tulsa Educare  
Tulsa Stakeholders



# *Field of Interest Funds*

## FIELD OF INTEREST FUNDS

### **FIELD OF INTEREST FUNDS:**

Asia International Fund  
Global Charitable Fund  
Martin Family Fund  
PriCare Development Fund







TULSA COMMUNITY FOUNDATION AND AFFILIATED ORGANIZATIONS

CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

As of December 31,	2006	2005
<b>ASSETS:</b>		
Cash and cash equivalents	\$ 641,044,668	\$ 389,686,883
Investments	2,483,436,386	1,865,174,644
Contributions receivable	3,027,843	6,890,872
Other receivables	2,895,189	1,728,313
Property and equipment, net of accumulated depreciation	6,293,924	1,083,315
<b>TOTAL ASSETS</b>	<b>\$ 3,136,689,010</b>	<b>\$ 2,264,564,027</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>LIABILITIES:</b>		
Accounts payable and accrued liabilities	\$ 6,436,716	\$ 6,624,125
Grants payable	35,337,815	20,989,755
Assets held for others	15,667,430	12,696,944
<b>TOTAL LIABILITIES</b>	<b>57,441,961</b>	<b>40,310,824</b>
<b>COMMITMENTS</b>		
<b>NET ASSETS:</b>		
Unrestricted	3,076,232,061	2,216,089,828
Temporarily restricted	3,023,988	8,163,375
<b>TOTAL NET ASSETS</b>	<b>3,079,256,049</b>	<b>2,224,253,203</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 3,136,698,010</b>	<b>\$ 2,264,564,027</b>

**TULSA COMMUNITY FOUNDATION AND AFFILIATED ORGANIZATIONS**

**CONSOLIDATED STATEMENTS OF ACTIVITIES**

<b>As of December 31,</b>	<b>2006</b>	<b>2005</b>
<b>UNRESTRICTED NET ASSETS:</b>		
Revenues and gains:		
Contributions	\$ 734,063,249	\$ 771,255,479
Interest, dividends and other	80,520,115	39,678,303
Net realized and unrealized gains on investments	108,023,835	201,065,661
Discontinued operations	-	19,329,275
Total Revenues and Gains	922,607,198	1,031,328,718
Net Assets Released from Restriction	5,326,477	1,491,044
Total Unrestricted Support	924,528,664	1,032,819,762
Expenses:		
Grant services	49,097,292	29,572,740
General and administrative	1,306,726	764,190
Fund raising	47,682	42,533
Investment services and other	15,345,053	9,253,389
Depreciation	362,742	286,090
<b>Total Expenses</b>	<b>66,108,469</b>	<b>39,918,942</b>
Increase in Unrestricted Net Assets	861,825,206	992,900,820
<b>TEMPORARILY RESTRICTED NET ASSETS:</b>		
Contributions	187,090	3,928,338
Net assets released from restriction	(5,326,477)	(1,491,044)
(Decrease) increase in Temporarily Restricted Net Assets	(5,139,387)	2,437,294
<b>TOTAL INCREASE IN NET ASSETS</b>	<b>856,685,819</b>	<b>995,338,114</b>
<b>WITHDRAWAL OF AFFILIATED ORGANIZATIONS</b>	<b>(1,682,973)</b>	<b>-</b>
<b>NET ASSETS, beginning of year</b>	<b>2,224,253,203</b>	<b>1,228,915,089</b>
<b>NET ASSETS, end of year</b>	<b>\$ 3,079,256,049</b>	<b>\$ 2,224,253,203</b>

# Board of Trustees



**James Adelson**  
Nadel and Gussman, LLC  
President

TCF Secretary/Treasurer  
of the Board



**Phil Frohlich**  
Prescott Capital Management  
Manager



**Sharon Bell**  
Rogers and Bell  
Attorney



**Hans Helmerich**  
Helmerich & Payne  
President and CEO

TCF President of the Board



**Steve Bradshaw**  
Bank of Oklahoma  
Sr. Executive VP



**Jake Henry, Jr.<sup>1</sup>**  
Saint Francis Health System  
President and CEO



**Chet Cadieux<sup>2</sup>**  
QuikTrip Corporation  
Chairman and CEO



**Tom Kivisto**  
SemGroup, L.P.  
CEO



**Joe Cappy**  
Dollar Thrifty Automotive Group  
Chairman and CEO (retired)

TCF Chairman of the Board



**David Kyle**  
ONEOK, Inc.  
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Tulsa Area United Way  
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**Ken Levit**  
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**Frederic Dorwart**  
Frederic Dorwart, Lawyers  
Attorney



**Steve Malcolm**  
Williams  
Chairman, President and CEO



**Paula Marshall**  
Bama Companies, Inc.  
President and CEO



**Stacy Schusterman**  
Samson Investment Company  
Chairperson and CEO



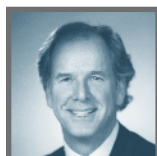
**Chip McElroy II**  
McElroy Manufacturing  
President and CEO



**Kathy Taylor<sup>3</sup>**  
City of Tulsa  
Mayor



**Jean McGill**  
Noble Investments  
CEO



**Robert Thomas**  
Senior Star Living  
Co-Owner



**Tom McKeon**  
Tulsa Community College  
President and CEO



**William Thomas**  
Senior Star Living  
Co-Owner



**Gary Paxton**  
Dollar Thrifty Automotive Group  
President and CEO



**John-Kelly Warren**  
The William K. Warren Fdn.  
Chairman



**Rose Cellino Reynolds**  
Reynolds Pastoral Care Fdn.  
Chairperson and President



**Andrew Wolov**  
Hall Estill  
Attorney



**Gail Richards**  
Zarrow Family Office, L.L.C  
Manager

1 ex-officio Trustee as chairperson of Tulsa Area United Way

2 elected Trustee and ex-officio Trustee as chairperson of Tulsa Metro Chamber

3 ex-officio Trustee as Mayor of Tulsa



# *TCF Executives and Staff*

TCF EXECUTIVES AND STAFF



***Standing (from left to right):***

**Stephanie Stallsmith**, Program Officer, **Karen L. Davis**, Sr. Program Officer, **Phil Lakin, Jr. CFRE**, Executive Director, **Laura Chalus**, Donor Services Administrator, **John C. Wolkill**, Director of Administration and Donor Partnerships

***Seated (from left to right):***

**Lindsay Bowen**, Office Manager, **Debbie Allen, CPA**, Controller, **Andrea McNeil**, Sr. Accountant

**Special Thanks**

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