**CONTENTS**

Letter from the Executive Director .....................1
TCF History .................................................................2
Community Needs ..........................................................3
TCF’s Approach ................................................................6
TCF’s Programs ...............................................................7
Community Impact ..........................................................11
Why Give ........................................................................12
How to Give .....................................................................13
Ways To Give ....................................................................15
Donor Profiles ................................................................16
Donor Advised Funds .......................................................17
Corporate Donor Advised Funds .................................18
Corporate Donor Profiles ............................................19
Donor Designated Funds ................................................21
Scholarship and Hardship Funds ...................................22
Agency Profiles ...............................................................23
Charitable Agency Funds .................................................26
Special Gift Profile ........................................................29
Supporting Organizations .............................................30
Field of Interest Funds ....................................................31
Financials ........................................................................32
Board of Trustees ...........................................................34
TCF Executives and Staff ...............................................36
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
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.
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.
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

<table>
<thead>
<tr>
<th>School District</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tulsa County</td>
<td>-21.3%</td>
</tr>
<tr>
<td>Bixby</td>
<td>-8.8%</td>
</tr>
<tr>
<td>Broken Arrow</td>
<td>-11.17%</td>
</tr>
<tr>
<td>Glenpool</td>
<td>-32.01%</td>
</tr>
<tr>
<td>Jenks</td>
<td>-5.55%</td>
</tr>
<tr>
<td>Owasso</td>
<td>-12.73%</td>
</tr>
<tr>
<td>Sand Springs</td>
<td>-20.1%</td>
</tr>
<tr>
<td>Tulsa</td>
<td>-38.22%</td>
</tr>
<tr>
<td>Union</td>
<td>-9.9%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>School District</th>
<th>Free</th>
<th>Reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tulsa County Total</td>
<td>43.6%</td>
<td>10%</td>
</tr>
<tr>
<td>Tulsa</td>
<td>69.2%</td>
<td>11.9%</td>
</tr>
<tr>
<td>Sand Springs</td>
<td>49.5%</td>
<td>17%</td>
</tr>
<tr>
<td>Glenpool</td>
<td>32.4%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Union</td>
<td>28.1%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Broken Arrow</td>
<td>23.1%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Bixby</td>
<td>18.1%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Jenks</td>
<td>18.1%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Owasso</td>
<td>15.5%</td>
<td>6.7%</td>
</tr>
</tbody>
</table>

Free lunch eligibility requirement:
Annual household income below 130% of poverty, which currently is $20,917 for a family of three.

Reduced lunch eligibility requirement:
Annual household income below 185% of poverty, which currently is $29,767 for a family of three.

People with Bachelors Degree
25 yrs old and older

State of Oklahoma 22.40%
City of Tulsa 30.70%
Tulsa MSA 25.40%
Tulsa County 30%

Health Care

Insured 54%
Medicaid 16%
Medicare 11%
Uninsured 19%

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

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 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.
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-Whittington 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.

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.

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

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.

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.

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.
How to Give Through TCF

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.
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

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:

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
Serdipity 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
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.
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 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 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  
Hujasak Engineering Scholarship Endowment Fund  
Human Skills and Resources Fund  
Idabel Academic Fund  
Idabel Chamber Fund
Idabel Kiwanis Club Fund
Idabel Lions Club Scholarship Fund
Idabel Rotary Fund
IMSI Fund
Indian Health Care Resource Center of Tulsa Fund
Indian Nations Council Fund
Iron Gate at Trinity Fund
John 3:16 Mission, Inc. Endowment Fund
Junior Achievement of Eastern Oklahoma Fund
Junior League of Tulsa Endowment Fund
Kendall-Whittier Elementary School Reserve Fund
Kendall-Whittier, Inc. Endowment Fund
Kendall-Whittier, Inc. Youth Endowment Fund
Key to Hope Endowment Fund
Key to Hope Owen Trust Fund
Kiwanis Club of Tulsa Southeast Fund
Leadership Tulsa Fund
League of Women Voters of Metropolitan Tulsa Fund
Legal Aid Services Oklahoma Fund
LIFE Senior Services Fund
Little Light House Endowment Fund
Lollipops and Rainbows Endowment Fund
M.S.N.I. Fund
Make-A-Wish Foundation of Oklahoma Fund
Margaret Hudson Building Endowment Fund
Margaret Hudson Operating Endowment Fund
Mark Iola Scholarship Fund
McCurtain Community Fund
McCurtain County Boys & Girls Club Fund
Meals on Wheels of Metro Tulsa Endowment Fund
Mental Health Association in Tulsa, Inc. Fund
Metro Christian Academy Foundation Fund
National Indian Monument & Institute Fund
National Wrestling Hall of Fame Endowment Fund
Neighbor for Neighbor Fund
Neighbors Along the Line Fund
Neuro-Science Research Foundation, Inc. Fund
Neuro-Science Research Foundation Reserve Fund
New Life Ranch Hope Endowment Fund
Nowata Educational Endowment Foundation Fund
Oasis Adult Day Services Endowment Fund
OCCJ Fund
OCCJ Different and the Same Endowment Fund
OkEq Capital Campaign Fund
Oklahoma Brain Tumor Foundation Fund
Oklahoma Caring Foundation Fund
Oklahoma Center for Nonprofits Fund
Oklahoma Christian University Fund
Oklahoma Humanities Council Endowment Fund
Oklahoma Partnership for School Readiness Foundation, Inc. Endowment Fund
Oklahomans for Equality Fund
Okmulgee County Family Resource Center Endowment Fund
Operation Aware of Oklahoma, Inc. Fund
Oxley Nature Center Endowment Fund
Parent Child Center of Tulsa Fund
Partnership for the Availability of School Supplies (PASS) Endowment Fund
Planned Parenthood Endowment Fund
Planned Parenthood Reserve Fund
RARC Endowment Fund
Reaching Hands Development Fund
Rebuilding Together Tulsa Endowment Fund
Resonance Listening and Growth Fund
Restore Hope Ministries Endowment Fund
Riverfield Endowment Fund
Robert S. Rizley Opera Education Endowment Fund
Rocky Mountain Philatelic Library Fund
Rogers County Volunteers for Youth Endowment Fund
Rogers County Youth Services Endowment Fund
Rotary Club of Bixby Fund
Salvation Army Endowment Fund
Sherwin Miller Museum of Jewish Art Challenge Fund
Simon Estes Educational Fund
South Grand Lake Meals on Wheels Endowment Fund
Southern Hills Baptist Church Memorial Foundation Fund
Special Olympics Oklahoma Fund
Stand In The Gap Endowment Fund
Street School Endowment Fund
TARC Endowment Fund
Teen Challenge of Oklahoma Fund
TESCOT Endowment Fund
Theater Arts Productions Endowment Fund
Therapetics Service Dogs Fund
Tom Action Community Fund
Town and Country School, Inc., Fund
Tri-County CASA Fund
Trinity Episcopal Day School Endowment Fund
TSHA Fund
Tulsa Air and Space Center Endowment Fund
Tulsa Area United Way - Bailey Endowment Fund
Tulsa Area United Way Endowment Fund
Tulsa Area Youth Symphony Endowment Fund
Tulsa Ballet Fund
Tulsa Boys’ Home Endowment II Fund
Tulsa C.A.S.A.
Tulsa Cerebral Palsy Endowment Fund
Tulsa County Medical Society Community Development Fund
Tulsa Day Center for the Homeless Endowment Fund
Tulsa Day Center for the Homeless Capital Needs Reserve 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
Tulsa Metropolitan Ministry Endowment Fund
Tulsa Opera Fund
Tulsa Partners Endowment Fund
Tulsa Police Officers’ Memorial Fund
Tulsa Project Woman Endowment Fund
Tulsa Reaches Out Fund
Tulsa Repertory Theatre Endowment Fund
Tulsa Youth Symphony Fund
Tulsa Zoo Friends Fund
Undercroft Montessori School Endowment Fund
United Christian Giving Fund
University of Tulsa Presidential Scholars Endowment Fund
University of Tulsa University School Endowment Fund
Up With Trees, Inc., Fund
Vian Community Charitable Trust Endowment Fund
Vinita Public Schools Educational Foundation
Gatlin/FFA Trust Fund
Vinita Public Schools Educational Foundation General Fund
Vinita Public Schools Educational Foundation Goodpaster Trust Fund
Visiting Nurse Association Fund
Volunteers of America (Tulsa) Endowment Fund
WoHeLo Trust Fund
Wright City Schools Foundation Fund
YMCA of Greater Tulsa Endowment Fund
Youth at Heart Fund
Youth Services of Tulsa Endowment Fund
YWCA of Tulsa Endowment Fund
YWCA of Tulsa North Endowment 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:
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:
Asia International Fund
Global Charitable Fund
Martin Family Fund
PriCare Development Fund
## TULSA COMMUNITY FOUNDATION AND AFFILIATED ORGANIZATIONS

### CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

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

#### CONSOLIDATED STATEMENTS OF ACTIVITIES

**As of December 31, 2006 2005**

#### UNRESTRICTED NET ASSETS:

Revenues and gains:

<table>
<thead>
<tr>
<th>Description</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$734,063,249</td>
<td>$771,255,479</td>
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<tr>
<td>Interest, dividends and other</td>
<td>80,520,115</td>
<td>39,678,303</td>
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<tr>
<td>Net realized and unrealized gains on investments</td>
<td>108,023,835</td>
<td>201,065,661</td>
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<tr>
<td>Discontinued operations</td>
<td>-</td>
<td>19,329,275</td>
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<tr>
<td><strong>Total Revenues and Gains</strong></td>
<td>922,607,198</td>
<td>1,031,328,718</td>
</tr>
</tbody>
</table>

Net Assets Released from Restriction                          | 5,326,477  | 1,491,044   |

Total Unrestricted Support                                     | 924,528,664| 1,032,819,762|

Expenses:

<table>
<thead>
<tr>
<th>Description</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant services</td>
<td>49,097,292</td>
<td>29,572,740</td>
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<tr>
<td>General and administrative</td>
<td>1,306,726</td>
<td>764,190</td>
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<tr>
<td>Fund raising</td>
<td>47,682</td>
<td>42,533</td>
</tr>
<tr>
<td>Investment services and other</td>
<td>15,345,053</td>
<td>9,253,389</td>
</tr>
<tr>
<td>Depreciation</td>
<td>362,742</td>
<td>286,090</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>66,108,469</td>
<td>39,918,942</td>
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</tbody>
</table>

Increase in Unrestricted Net Assets                            | 861,825,206| 992,900,820|

#### TEMPORARILY RESTRICTED NET ASSETS:

<table>
<thead>
<tr>
<th>Description</th>
<th>2006</th>
<th>2005</th>
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</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>187,090</td>
<td>3,928,338</td>
</tr>
<tr>
<td>Net assets released from restriction</td>
<td>(5,326,477)</td>
<td>(1,491,044)</td>
</tr>
<tr>
<td><strong>(Decrease) increase in Temporarily Restricted Net Assets</strong></td>
<td>(5,139,387)</td>
<td>2,437,294</td>
</tr>
</tbody>
</table>

**TOTAL INCREASE IN NET ASSETS**                                | 856,685,819| 995,338,114|

### WITHDRAWAL OF AFFILIATED ORGANIZATIONS

<table>
<thead>
<tr>
<th>Description</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WITHDRAWAL OF AFFILIATED ORGANIZATIONS</strong></td>
<td>(1,682,973)</td>
<td>-</td>
</tr>
<tr>
<td><strong>NET ASSETS, beginning of year</strong></td>
<td>2,224,253,203</td>
<td>1,228,915,089</td>
</tr>
<tr>
<td><strong>NET ASSETS, end of year</strong></td>
<td>$3,079,256,049</td>
<td>$2,224,253,203</td>
</tr>
</tbody>
</table>
Board of Trustees

James Adelson
Nadel and Gussman, LLC
President
TCF Secretary/Treasurer of the Board

Sharon Bell
Rogers and Bell
Attorney

Steve Bradshaw
Bank of Oklahoma
Sr. Executive VP

Chet Cadieux
QuikTrip Corporation
Chairman and CEO

Joe Cappy
Dollar Thrifty Automotive Group
Chairman and CEO (retired)
TCF Chairman of the Board

Kathleen Coan
Tulsa Area United Way
President and CEO

Frederic Dorwart
Frederic Dorwart, Lawyers
Attorney

Phil Frohlich
Prescott Capital Management
Manager

Hans Helmerich
Helmerich & Payne
President and CEO
TCF President of the Board

Jake Henry, Jr.
Saint Francis Health System
President and CEO

Tom Kivisto
SemGroup, L.P.
CEO

David Kyle
ONEOK, Inc.
Chairman

Ken Levit
George Kaiser Family Fdn.
Executive Director

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  
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  
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

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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
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
Thank you to Bob McCormick for his outstanding professionalism, generosity and photography.

To the many non-profit partners who provided photographs of their remarkable programs and people.

A very special thank you to Jesse Boudiette and Jennifer Brown from Bank of Oklahoma for the long hours spent designing, laying out and editing this annual report.

Thank you to the many volunteers who give so generously of their time to serve on the various boards, committees, and in the office of Tulsa Community Foundation. We recognize and celebrate your many contributions to the Foundation and to the community. Thank you.