

to
get
er WE
WILL.



BARTLESVILLE
COMMUNITY
FOUNDATION



208 E. 4th St., Bartlesville, OK 74003
918.337.2287 | bartlesvillecf.org





Dear Friends,

What a year! The Bartlesville Community Foundation continues to set new records through the impact of grantmaking. In 2022, more than 11% of the Foundation's total assets were granted back to our communities. That is \$2.28 million from more than 160 funds at the Foundation. These funds support valuable initiatives and do critical work. This far exceeds expectations and means donors like YOU are making a difference through the Power of Together.

I invite you to join us in 2023. Start a fund, share the grant cycles with an organization you support, talk about the scholarship opportunities with a student in your family, or design a legacy of giving through your estate plan. Philanthropy looks different for everyone, and the Bartlesville Community Foundation is here to help you achieve your unique philanthropic goals.

By supporting the Foundation, you help ensure this great work continues. I hope you'll join me in giving to the Foundation this giving season!

Cana Mize, *Board Chair*

Board

Cana Mize - *Chair*
 Debbie Mueggenborg - *Vice Chair*
 Spencer King - *Treasurer*
 Kristen Lindblom - *Secretary*

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 Donna Bode
 Greg Collins
 Sara Freeman

Kevin Hay
 David Ingram
 Penny Johnson
 Jane Kirkpatrick
 Mat Saddoris

Staff

Laura Jensen, MBA
Executive Director

Anne Swearingin
Finance and Accounting Manager

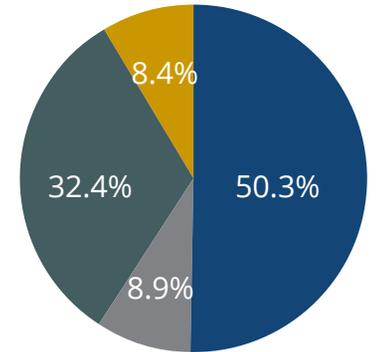
Ashlie Darnell
Office Manager



Our Investment Strategy

\$20.28M in total assets*

- Funds at the BCF are pooled, so everyone benefits from investment performance.
- Investments are managed by our portfolio managers at Arvest Wealth Management. The BCF Finance Committee and Board regularly review performance and ensure adherence to investment policy statements.



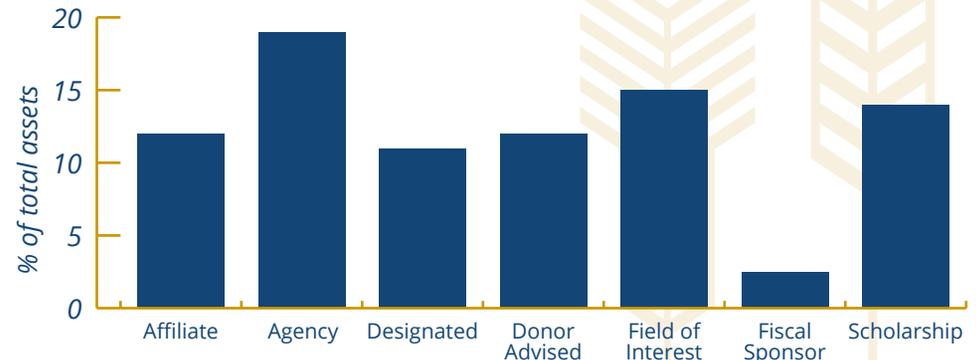
- Equity
- Alternatives
- Fixed Income
- Cash



BCF Investment Performance

Avg Annual Rate of Return

1 year; Dec 31, 2020 - Dec 31, 2021	10.6%
2 years; Dec 31, 2019 - Dec 31, 2021	9.8%
3 years; Dec 31, 2018 - Dec 31, 2021	12.7%
4 years; Dec 31, 2017 - Dec 31, 2021	7.6%



* values used in this report are from YE June 30, 2022

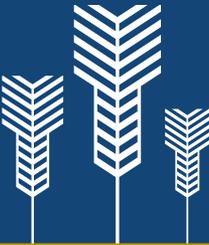
Because of our donors, in 2021-22 we...

166

saw funds working together to benefit our community

Grew to
\$20.28M

in total Foundation assets



Awarded
\$26K
in board member grants



Awarded
\$144,000
in scholarships



Granted
\$2.28M
in grants out of the Foundation



3 Affiliate Partners



Bartlesville Public Schools
FOUNDATION

Bluestem
MEDICAL FOUNDATION

WELCOME
NWATA
COMMUNITY FOUNDATION



Together we are The Foundation



Shoemaker Family

"We use a donor-advised fund to be strategic with our philanthropic interests. Holding a fund with BCF allows our contributions to grow via the market and then we can give more out to nonprofits we care about. BCF has also connected us with new and different nonprofits in the community, which has expanded our giving."

OK EAT - Oklahoma Energy & Agriculture Training

"Bartlesville Community Foundation has created the opportunity for OK EAT to deliver energy and agriculture education programs that enhance the social and economic well-being of Bartlesville community members as well as those in surrounding communities."



Work with the Foundation

1 Outline your personal philanthropic goals.

2 Give to an existing fund, BCF general fund, or start a named fund.

3 Work with BCF & your professional advisor to start or leave a legacy.

Let's get started! Call 918.337.2281 or email laura@bartlesvillecf.org

Congratulations 2022 Legacy Honorees



The Keleher Family



The Creel Family



The David B. King Family