

# **BCF Board Mtg**

**May 27, 2025**



# **Childcare Provider Grants**



Early Childhood Education  
Support Fund

**\$110,000  
RAISED**



## Spring 2025 Childcare Grant Awardees

<b>Firm Foundation CDC</b>	\$1,815
<b>Jennifer's Family Childcare</b>	\$2,000
<b>Kiddie Korner Childcare &amp; Early Learning Center</b>	\$2,000
<b>Kiddie Korner Childcare &amp; Early Learning Center Frank Phillips</b>	\$2,000
<b>Lil' Buckaroos Childcare and Preschool</b>	\$2,000
<b>Lollipop Land</b>	\$2,000
<b>Safari Kids</b>	\$2,000

# Scholarship Presentations



**62** *to* **45**  
**SCHOLARSHIPS** **STUDENTS**



# **Marketing Materials for Agencies**





## TERMS OF ENDOWMENT

### A GLOSSARY OF ENDOWMENT LANGUAGE

## ALL ABOUT ENDOWMENT

### INSPIRATION TO SHARE WITH YOUR DONORS

## FREQUENTLY ASKED QUESTIONS

### ABOUT GIFTS TO YOUR AGENCY ENDOWMENT FUND AT THE BARTLESVILLE COMMUNITY FOUNDATION

### 1 What happens when someone gives to our agency endowment at the Bartlesville Community Foundation?

The BCF acknowledges all gifts received for the benefit of your agency endowment with a letter to the donor, including any appropriate tax language. You will also be notified by mail of the gift so you may thank the donor for their generosity. The gift is credited to your agency endowment fund and invested with our pool of funds to provide continued support for your organization.

### 2 How should we properly acknowledge a gift to our agency endowment?

In short, express your gratitude and leave the IRS out of it completely. A good approach is to explicitly state that the contribution was received by the BCF and you are merely following up to let them know how much you appreciate their support. Making sure your acknowledgment doesn't look like a tax receipt helps ensure that donors don't double count the deduction by mistake.

### 3 Why did the donor choose to give to the agency endowment rather than to your agency directly?

### 4 How can I let donors know they can give to our agency endowment?

Passive information on your website, Facebook page or newsletters lets donors know you have an agency endowment fund. If you are engaged in a campaign to increase your agency endowment consider marketing the speaks specifically to the mechanics of your agency endowment and the benefits it will bring to your organization.

### 5 How can I publicly acknowledge gifts to our agency endowment?

When listing a gift to your agency endowment in publications such as news releases, annual reports, and websites, you have an opportunity to encourage additional gifts as well as promote greater understanding of endowment. Consider something like this: ABC Donor has contributed to XYZ Agency's permanent endowment fund at the Bartlesville Community Foundation, providing perpetual support for our mission/program. If you would like to give cash or non-cash assets that will provide support year after year, please reach out to our development director.

### 6 What should we NOT do when we receive a gift to our agency endowment?

Do not send a tax letter of any sort to anybody. Any tax benefit has already been given and an additional letter from you could result in confusion.

Do not add BCF to your mailing list; we do not pass donors' information to other agencies.

## ENDOWMENT TOOLKIT

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## TERMS OF ENDOWMENT

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*The BCF is not a legal, tax or financial advisor. Always consult with your legal, financial, and tax advisors to determine what might be best for your personal situation!*

#### Matching Gifts Program

A grant or contribution program that will match gifts made to qualifying nonprofits. Specific guidelines are established by each employer or foundation.

#### Nonprofit Endowment Program

BCF's programmatic support of the 40+ designated agency funds endowed for the benefit of named nonprofits.

#### Oklahoma Solicitation of Charitable Contributions Act

Revised in 2011, this requires that all nonprofits soliciting charitable donations, regardless of revenue, must register with the Oklahoma Secretary of State each year. Exempted from the registration are churches, schools and universities, and some member-based organizations.

#### Permanently Restricted Balance

Sum of any contribution to an agency endowment fund by the agency.

#### Planned Gift

Contributions made as a result of a process to choose the most appropriate gift for the most important purpose in the most advantageous time frame for the donor, the charity, and the donor's heirs. BCF's planned gift commitment form helps donors and the BCF best prepare to steward these gifts.

#### Private Foundation

A non-governmental, nonprofit organization with funds (usually from a single source, such as an individual, family or corporation), programs, and grant-making managed by its own trustees.

#### Spendable Fund or Reserve Fund

Not part of your permanent endowment but held by the BCF and invested with the pooled funds to take advantage of strong investment performance. Special balance limits and fee structures may apply. Often a tool for goal setting.

## DIRECTING GIFTS

### FOR THE BENEFIT OF YOUR FUND AT THE BCF

## DID YOU KNOW?

#### Toolkit

An online resource repository for BCF's agency endowments.

#### Variance Power

An important distinguishing feature of a community foundation is the "variance power" found in the Treasury Regulations at Section 1.170A-9(f)(1)(i)(v)(B). The variance power gives a community foundation greater flexibility to adapt to the changing charitable needs of the community. More specifically, the variance power gives a community foundation the unilateral power to change the charitable purpose of a fund if circumstances have sufficiently changed to make the original restriction inappropriate - most notably when an organization folds its operations.

## Reading Your Fund Statement

#### Beginning Balance

The balance of the fund as of the start of the quarter. This includes the corpus and any available spend balances.

#### Revenue

A summary of donations and investment activity of the fund.

#### Expenses

A summary of any grants or fees assessed to the fund.

#### Ending Balance

The corpus, plus accumulated investment performance, minus allocated spending/grants, administrative, and investment fees at the end of the quarter.





# Use Qualified Charitable Distributions

from your IRA to support

Website [bartlesvillecf.org](http://bartlesvillecf.org) Phone (918) 337-2287

**PLANNING =  
PEACE OF MIND**



## Close out the year strong. Make your year-end gift now!

**34%**  
Of total fundraising revenue is received from October - December.

**10%**  
Of all giving occurs in the last 3 days of the year. It's not too late!

The Bartlesville Community Foundation is a great place to help donors fulfill their year-end giving goals. Whether making a gift online to various organizations that work directly with the BCF, granting from a fund, or establishing a fund that lets you work toward your goals, we are here to help!

*Together we Build. Steward. Lead.*



## WHAT'S YOUR LEGACY?


**PLAN NOW** **IMPACT LATER**

**LET'S GET STARTED, TOGETHER.**

What legacy will you leave? Consider leaving a gift to charity in your will or trust. Through our partnership with the Bartlesville Community Foundation, we have tools to help you discover ways to make an impact that can be simple and significant to you, your family, and your community.

*Together we Build. Steward. Lead.*

Qualified Charitable Distributions (QCD) can be a perfect way to manage taxable income and support the charities you love. This solution may help you navigate tax rates and avoid IRA penalties!



**BARTLESVILLE COMMUNITY FOUNDATION**  
TOGETHER WE CAN  
321 SE DELAWARE AVE | BARTLESVILLE, OK 74003  
918.337.2287 | BARTLESVILLECF.ORG

## Giving Through a Will, Trust, or Retirement Asset

**BARTLESVILLE COMMUNITY FOUNDATION**  
We partner with donors, organizations, and professionals and bring unique tools that help everyone achieve their charitable goals through legacy planning.

**CHARITY**  
Planning means the causes you supported so passionately during your lifetime will continue to benefit from your dedication.

**FAMILY**  
Planning means your family is reassured in their decision making and can grieve knowing that your final wishes are being handled.

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321 SE DELAWARE AVE, | BARTLESVILLE, OK | 918.337.2287  
BARTLESVILLECF.ORG

**Our Mission**

We are here to help make creating and fulfilling your giving plan simple.

**Give by cash, stock, check, or online**  
Make sure cash/stock is received and checks are post dated no later than 12/31.

**IRA Distribution**  
Give directly to the organization(s) of your choice.

**Open a Fund**  
Start a fund at the BCF, invest your donation dollars, and watch them grow tax free so you can give more!

**Start or Finish a Planned Gift**  
Often the largest, most impactful gift given by a donor and received by an organization.

To \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_

**CONTACT**  
**918-337-2287**  
[bartlesvillecf.org](http://bartlesvillecf.org)

**WHY?**  
It can be the most impactful gift a donor ever makes and an organization ever receives.

**HOW?**

**Plan**  
Get the BCF's Planned Giving Guide to consider options before visiting an attorney/CPA/Financial Advisor.

**Act**  
If it's not planned, it won't happen! Work with a team to draft a Trust or Will and update beneficiaries on retirement assets!

**Relax**  
Live life relieved that a plan is in place and your legacy will be fulfilled with time.



# Social Media



**Bartlesville Community Foundation**  
April 22 at 7:00 AM · 🌐

Bartlesville Education Promise recognized the need for a FREE test preparation course for Bartlesville students interested in taking the SAT test. Thanks to a Fall 2023... [See more](#)

**The Power of Small Grants in Action**

**Fall 2023 Success Stories**

**Bartlesville Education Promise**

We had 16 students in grades 10 and 11 this year. The certified SAT College Board instructors taught them strategies that are different from the ACT tools we give students at BHS.

~~ Martin Garber, BEP Chairman.



**Bartlesville Community Foundation**  
April 23 at 7:00 PM · 🌐

The City of Bartlesville is asking all residents to complete the 2025 Community Survey! Visit this link, and please share with your network!... [See more](#)

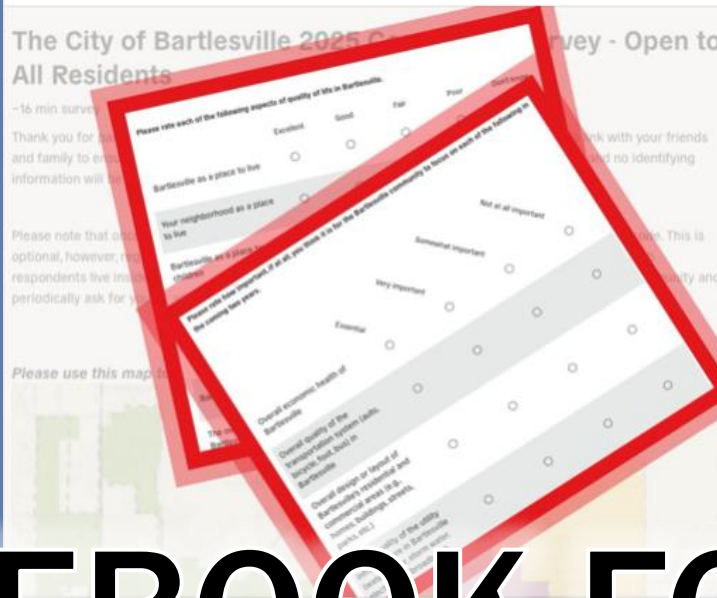
**The City of Bartlesville 2025 Community Survey - Open to All Residents**

~15 min survey

Please rate each of the following aspects of quality of life in Bartlesville.

	Excellent	Good	Fair	Poor	Not at all important
Bartlesville as a place to live					
Your neighborhood as a place to live					
Bartlesville as a place to work					
Please rate how important it is to you that the Bartlesville community focus on each of the following in the coming year					
Overall economic health of Bartlesville					
Overall quality of life in Bartlesville					
Overall design or trend of Bartlesville's community and urban form, built in Bartlesville					
Overall design or trend of Bartlesville's community and urban form, built in Bartlesville					
Overall design or trend of Bartlesville's community and urban form, built in Bartlesville					

Please use this map to indicate where you live in Bartlesville.




**Bartlesville Community Foundation**  
April 25 at 8:00 AM · 🌐

Got extra supplies or equipment you no longer need? Let's keep the generosity flowing!... [See more](#)

**GENEROSITY CORNER**

Let's help good stuff find a good home!



# 1,845 FACEBOOK FOLLOWERS


**Bartlesville Community Foundation**  
April 24 at 7:00 AM · 🌐

**#ThrowbackThursday** ThrowbackThursday Spotlight! 🌟  
Meet George Halkiades — a quiet force behind decades of positive change in Bartlesville. George has dedicated his retirement to... [See more](#)

**Throwback THURSDAY**

**HALKIADES FAMILY**

**2016 LEGACY HALL OF FAME HONOREE**



BARTLESVILLECF.ORG

**Halkiades Family (2016) - Bartlesville Community Foundation**  
George Halkiades was born January 15, 1942 in Kingsport, Tennessee to Phellos and Th...

**Bartlesville Community Foundation**  
April 29 at 10:00 AM · 🌐

CMT's stage magic needed a lift—literally! 🌟 Their old lift gave out, and repairs were too pricey. Thanks to the BCF's Legacy Hall of Fame Grant, they scored a pre-owne... [See more](#)

**The Power of Small Grants in Action**

**Fall 2023 Success Stories**

**Children's Musical Theatre**

The lift is in daily use and is keeping our volunteers safe. We are incredibly grateful!

~~Rachel Miller, Former CMT Executive Director



**Bartlesville Community Foundation**  
May 1 at 6:00 AM · 🌐

**#ThrowbackThursday** Spotlight! 🌟  
Charlie and Corky Bowerman made it their mission to help Bartlesville thrive. After Charlie's basketball career with the Phillips 66ers ... [See more](#)

**Throwback THURSDAY**

**BOWERMAN FAMILY**

**2016 LEGACY HALL OF FAME HONOREE**



BARTLESVILLECF.ORG

**Bowerman Family (2016) - Bartlesville Community Foundation**  
Charles "Charlie" & Coralea "Corky" Bowerman, both raised in Alamo, Indiana were wed...




**Bartlesville Community Foundation**  
May 6 at 7:00 PM · 🌐

🎵 The sounds of the season rang out thanks to the [Bartlesville Chorale's](#) performance of Handel's Messiah! This beloved Christmas tradition brings together local singers... [See more](#)

**The Power of Small Grants in Action**

**Fall 2023 Success Stories**

**Bartlesville Chorale**



“The funding assured that the orchestra could be hired to provide the accompaniment to the Chorale. That adds so much to the performance and helps to draw a larger audience.”

— [Erin Cook, Grants Coordinator](#)

**Bartlesville Community Foundation**  
May 7 at 7:02 PM · 🌐

The new Charity Enforcement Unit of the Oklahoma Attorney General's office is making sure that your nonprofit isn't changing its mission or dissolving without first get... [See more](#)

**Sector Connector**

brought to you the first Wednesday of each month at 10 am by  
The Oklahoma Center for Nonprofits

VIMEO.COM

**Nonprofit Sector Connector - May 7, 2025**  
Topic: "What Nonprofits Need to Know About The Boy Scout Bill" Presenter: Jeri Holme...

**Bartlesville Community Foundation**  
May 8 at 6:01 AM · 🌐

🌟 [#ThrowbackThursday](#) Spotlight! 🌟  
Since moving to Bartlesville in 2002, Mark and Debbie Haskell quickly jumped in to make a difference—accomplishing more for our community... [See more](#)

**Throwback THURSDAY**

**HASKELL FAMILY**

**2017 LEGACY HALL OF FAME HONOREE**

BARTLESVILLECF.ORG

**Haskell Family (2017) - Bartlesville Community Foundation**  
Mark and Debbie Haskell met in a very romantic fashion – they both worked at the sam...



# 1,845 FACEBOOK FOLLOWERS

**Bartlesville Community Foundation**  
May 11 at 7:00 AM · 🌐

🌸 Happy Mother's Day from all of us at the Bartlesville Community Foundation! 🌸 Today we honor the moms, grandmothers, and mother figures whose love and care help shape ... [See more](#)



**Bartlesville Community Foundation**  
4h · 🌐

**DEBUNKING Nonprofit Myths**

**MYTH OR FACT?**

**Nonprofits should not make a profit.**

**MYTH: Nonprofits should not make a profit.**

Effective nonprofits operate with a business mindset—generating surplus revenue to grow, innovate, and weather economic downturns, while strategically reinvesting in their mission for lasting impact.

**Bartlesville Community Foundation**  
May 9 at 7:00 AM · 🌐

Mark your calendars! BCF's Executive Director, Laura Jensen, will be one of the featured speakers at Arvest's Friday Financial Forum on Friday, May 16th!... [See more](#)

**ALL ABOUT BCF & PLANNED GIVING**

**ARVEST Friday Forum**

**10am, Friday, May 16**  
**Arvest Eastside Branch**  
**Bartlesville**



# The BCF Bulletin







## Email performance

May 1, 2025 - May 19, 2025 • **Excludes** Apple MPP

# 558 subscribers



Open rate

**22.8%**

126 opened



Click rate

**8.0%**

44 clicked



Bounce rate

**0.90%**

5 bounced



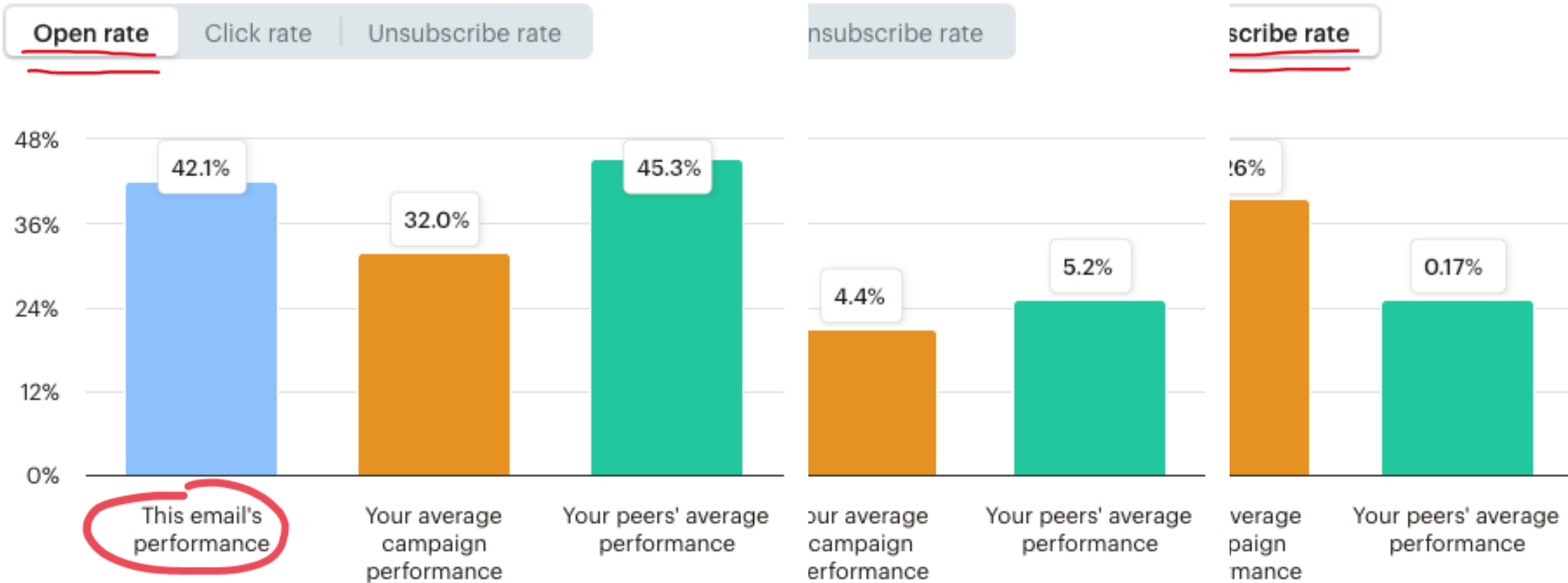
Unsubscribe rate

**0%**

0 unsubscribed



# How your email compares



# **Speaking Engagements**



# Arvest

## Friday Financial Forum

### May 16





# Upcoming Events





**June 2 through 5 - Grant Check Presentations**



**June 10 - Nonprofit Connect Coffee Club** 



**June 12 - PG Calc Webinar: *"Navigating Your AI Transformation"***



**June 24 - BCF Board Meeting**