



OKLAHOMA CITY
COMMUNITY FOUNDATION
Helping you help the community

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Disaster Relief Fund Transition Summary

Following the bombing of the Murrah Building in 1995, the Oklahoma City Community Foundation worked with more than 40 other community organizations to provide emergency and relief services to those affected by the bombing. Over the next few years, the Oklahoma City Community Foundation's Disaster Relief Fund administered more than 20 funds established by other donors and groups to continue assisting the survivors. The two largest funds were the Mayor's Fund and the Survivors' Education Fund which was primarily funded by the Governor's Victims and Families Relief Fund.

Direct assistance was provided to more than 1,200 different individuals. During the initial recovery phase, the focus of assistance was on medical and mental health services, direct assistance with living expenses to families that had been impacted by either death or critical injury, and case management efforts which worked with individuals and families to facilitate the many challenges that they faced and to help them begin moving forward.

Within 10 years of the bombing, the Disaster Relief Fund and the American Red Cross of Central Oklahoma were the only remaining direct service providers in the community working with the survivor group. The cooperative relationship between these two organizations was and continues to be very strong. In 2005, the Community Foundation Trustees and the Disaster Relief Fund Trustees projected the long-term needs of the survivor group and re-aligned the remaining funds to support case management, long-term medical and mental health services and direct assistance to those with disabilities attributable to the bombing. The Survivors' Education Fund has provided scholarships and educational assistance for the children of any person killed or permanently disabled in the bombing. As of fall 2014, 180 of the 213 eligible children had attended one or more semesters of college with 95 earning degrees. Because of the investment returns achieved by the Community Foundation on behalf of the Survivors' Education Fund, the Disaster Relief Fund was able to allocate funding for long-term support which substantially exceeded the original contributions received.

Following a comprehensive review of the Disaster Relief Fund in 2013, the Community Foundation Trustees and Disaster Relief Fund Trustees determined that a long-term plan for the administration of funds to benefit the survivor group should be implemented. The plan will retain the Disaster Relief Fund's commitment to address the medical and mental health needs of the survivors, and continue to provide case management for the current beneficiaries and a safety net for any needs that may arise in the future. The plan will transition the administrative services currently provided by Community Foundation staff to a corporate trustee that will be supported by the case manager at the Community Foundation's expense. For those individuals with significant long-term disabilities, an individual special needs trust will provide an assured

level of future support. For those survivors receiving medical and mental health services, the case manager, separately funded by the Community Foundation, will continue to review their needs and to coordinate support. Using a corporate trustee will provide greater continuity over time for these administrative functions.

The Disaster Relief Fund will provide funding for these individual trusts that will be permanently earmarked and not used for any other purpose unless or until the beneficiaries are no longer living. The Community Foundation Trustees will retain oversight of the corporate trustee and the case manager, and reserves the right to provide additional funding for the trusts if needed. The Community Foundation will also maintain a modest reserve to support any currently unknown need that might arise in the future.

The Survivors' Education Fund activities will be transferred to the Trustee Scholarship Initiative Committee at the Community Foundation. There is sufficient support available from this fund to fulfill the original commitments for fully funding undergraduate education for the primary beneficiary group (children of those killed or permanently disabled in the bombing). This ongoing educational support is expected to be available for the next 10 years.

This plan moves the administration of services that benefit survivors to a corporate trustee and permanently allocates funding to these trusts as long as there are beneficiaries. It retains the role of the case manager to assist survivors beyond just the financial support available. It will provide legal assistance with issues regarding disability, guardianship and long-term care. This plan is designed to deal with the long-term needs in an efficient and effective way and to demonstrate the Community Foundation and the Disaster Relief Fund's legal and practical commitment to continue the stewardship of all funds received and the earnings on those funds.

The Community Foundation has selected InvesTrust to serve as the corporate trustee and has retained Mark Holmes as legal counsel to assist with the drafting and implementation of the trusts described above. It is expected that the transition to this independent trust administration will occur by December 31, 2014.

Summary Statement:

The administration of the medical and mental health support for survivors of the Oklahoma City Bombing has been transferred to InvesTrust, an Oklahoma City-based trust company with extensive experience in this area. A case manager will continue to assist any survivor with needs that they may have resulting from the bombing. The scholarship assistance will be administered by the Trustee Scholarship Initiative Committee of the Oklahoma City Community Foundation.