



OKLAHOMA
BAR FOUNDATION



YOU'RE COVERED!
BY THE **OBF**

Annual Report
2013 - 2014

THANK YOU TO THE HONORED MEMBERS OF THE NEW OBF COMMUNITY FELLOWS PROGRAM CREATED FOR EXCLUSIVELY FOR GROUPS AND ORGANIZATIONS SUCH AS OBA SECTIONS, COUNTY BAR ASSOCIATIONS, LAW FIRMS AND BUSINESSES.

OBF Community Fellows

NEWEST COMMUNITY FELLOWS AT THE HIGHEST PATRON LEVEL

Bass Law, Oklahoma City and El Reno – 2014
The Chickasaw Nation Foundation, Statewide – 2014
Echols & Associates, Oklahoma City – 2014
The Garrett Law Center, Tulsa – 2013-14
OBA Family Law Section – 2013 and 2014
OBA Litigation Section – 2014

NEWEST COMMUNITY FELLOWS AT THE PARTNER LEVEL:

OBA Appellate Practice Section – 2014
OBA Financial Institutions and Commercial Law Section – 2014
OBA Intellectual Property Section – 2014

NEWEST BANK COMMUNITY FELLOW

Bank of Oklahoma, Statewide – 2014

Please go to www.okbarfoundation for a more complete listing of Oklahoma Bar Foundation Fellow Umbrella Giving Program Members

Thank you to our many generous donors!



**ANNUAL REPORT
2013-14**

Dear Friends,

- The OBF is the third oldest Bar Foundation in the Nation, which is something You can take pride in.
- Since 1946, Oklahoma Lawyers have carried the OBF Banner of “LAWYERS TRANSFORMING LIVES”.
- The OBF is the only one-stop charitable umbrella for law-related contributions in Oklahoma.
- OBF’s 501 (c)(3) nonprofit status allows the OBF to operate independently from influence of others.
- The OBF has awarded over \$11.5 million in regular and court grants since its inception.

In 2014, OBF has withstood continued challenges to IOLTA account rate allocations, fluctuating financial markets and intense competition from other charitable organizations. The Board of Trustees and the OBF Staff are without doubt the most energetic, devoted and loyal group of people you will ever meet.

As your President, I am humbled and honored to lead the OBF in 2014. Knowledge about the OBF’s mission and the ability to become a Fellow is enhanced by our outstanding website and the new OBF Video Story, which I encourage you to view. Our new Fellows umbrella of giving category of Community Fellows allows groups, law firms, financial institutions and businesses of all types to pledge their charitable donations to the work of the OBF.

All OBA Members are automatically members of the OBF. The transformation occurs when You become a Fellow, Sustaining Fellow, Benefactor Fellow or Community Fellow. As an OBF Fellow you become an integral part in the OBF’s mission of advancing education, citizenship and justice for all.

The OBF good deeds have improved the lives of more than 100,000 Oklahomans in 2014 alone. Please take this message as an invitation to join the OBF as a Fellow or as a Community Fellow. Then – take the opportunity to ask colleagues to join the OBF. Please remember that “*You cannot receive unless you ask*” and I ask You to help.

Very truly yours,

Dietmar K. Caudle

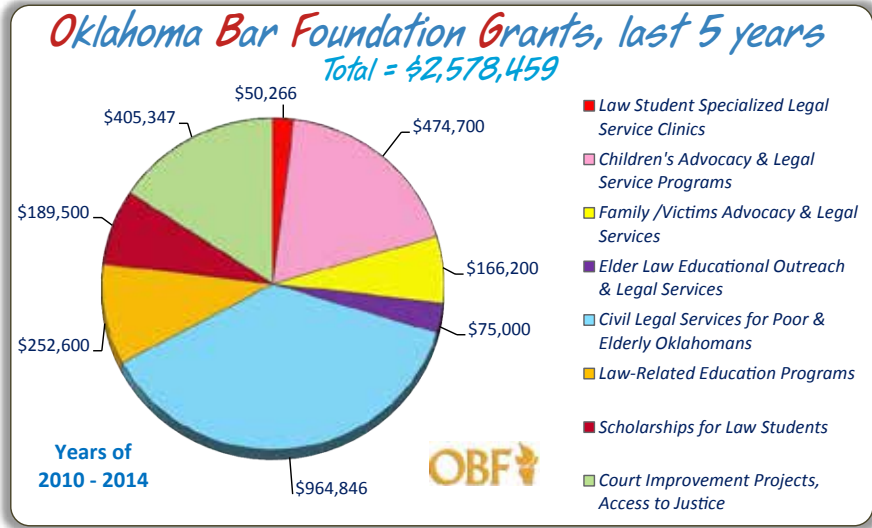


2014 Board of Trustees

OUR MISSION

Oklahoma Bar Foundation: Lawyers Transforming Lives for the better through the promotion of justice, funding of critical legal services and advocacy programs, and advancement of public awareness and better understanding of the law.

What OBF Does



The Oklahoma Bar Foundation gives back to the Communities that support our work. During 2014, the OBF has awarded funding to 33 different programs and projects in the amount of \$457,681. These statewide nonprofit groups served over 56,450 Oklahomans and their families through their ability to advance education, citizenship and justice – affecting tens of thousands more each year. The OBF has given \$11,535,049 since founding, immeasurably improving our Communities and our great State.

Alone, these statistics are just numbers – how the OBF uses them is what's most important!

Free Legal Assistance for Oklahoma's Poor and Elderly

Justice depends on having a fair chance to be heard, regardless of who you are, where you live, or how much money you have. Each year the OBF provides funding to organizations that provide free legal assistance for matters as important as evictions, mortgage foreclosure, child custody and child support, to name but a few of the cases involving basic needs. \$5,942,158 has been provided since 1984.



Safe Haven for the Abused



Victims of domestic violence can sometimes feel like they have no way out and there is nothing they can do to protect themselves. The violence is a national problem and knows no boundaries. The law does provide many options for

domestic violence victims that will help to better their situations. The OBF provides funding for legal services and court advocates, as well as prevention programs, that serve to improve victims lives all across Oklahoma. \$724,551 has been provided since 1984 plus thousands of hours of pro bono services.

Protection and Legal Assistance for Children



Every day children become victims of abuse or neglect and some of them will not survive. The OBF provides funding for the protection and legal assistance for children through a variety of services, some through support for programs that utilize pro bono children's representation using the time and talent of volunteer attorneys. The OBF also provides funding for children of divorce and child abuse education and prevention programs. Children have the

right to be safe and protected. \$857,250 has been provided since 1984 plus thousands of hours of pro bono legal services.



Public Law-Related Education Programs, Including Programs for School Children

Law-related education provides youth with the fundamental principles and skills needed to become responsible participant citizens. The OBA-YLD has set the standard of ways to energize and invigorate hundreds of attorneys to train high school students about our legal system through the Oklahoma High School Mock Trial Program,



funded by the OBF since program inception. OBF funding of law-related educational programs empowers students and citizens with a better understanding of our democratic system and the rule of law.

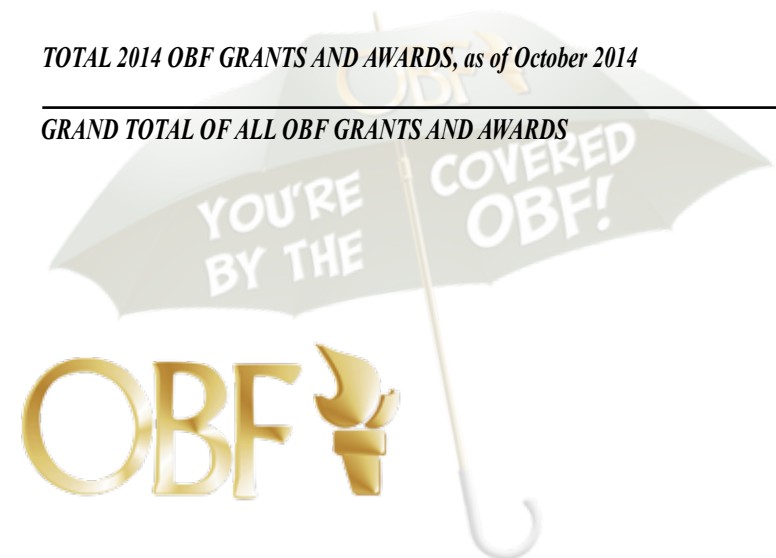


OBF provides funding for presentation of the YMCA Youth Legislative Day at the Capitol and for the new National Judicial Program Competition at the ABA in Chicago. \$252,600 has been provided for children's law-related education programs over the past five years with \$1,679,462 since 1984.



2014 OBF GRANTS AND AWARDS

Center for Children & Families, Inc.	\$ 10,000	Teen Court, Inc.	\$ 17,500
<i>Funding for general support of the free Divorce Visitation Arbitration Program providing services to the court in the provision of parent education and monitoring of court ordered supervised visitation and exchange services for children in Cleveland County.</i>		<i>Operational costs of the first offender program and education of students for positive resolution of misdemeanor offenses in Comanche County area.</i>	
Community Crisis Center, Inc.	\$ 5,000	Tulsa Lawyers for Children, Inc.	\$ 25,000
<i>Funding of the part-time domestic violence/sexual assault victim's court advocate for Ottawa County.</i>		<i>Funding to maintain staffing to provide legal assistance and advocacy to children and continued program expansion for representation of traumatized innocent children in juvenile court and emergency showcase hearings in the state's second largest county, Tulsa County.</i>	
Domestic Violence Intervention Services/Call RAPE, Inc.	\$ 12,000	TU Boesche Legal Clinic, Immigrants Rights Project	\$ 6,766
<i>Funding towards support of the domestic violence/sexual assault victim's Tulsa County Court Advocate position for delivery of civil legal services to low-income survivors.</i>		<i>Funding for the clinical legal education program to provide legal services to vulnerable non-citizen residents of Oklahoma while providing law- students with education and professional development opportunities, services in Tulsa County and the eastern portion of the state.</i>	
Family & Children's Services, Inc.	\$ 7,000	Wlm. W. Barnes Children's Advocacy Center, Child Abuse Training Program	\$ 3,000
<i>Funding of Tulsa Family Court Program to support children's required participation in the "Helping Children Cope with Divorce" program in Tulsa County area.</i>		<i>Funding to support a professional multidisciplinary team training approach for training and support to be able to recognize, respond and report child abuse for educational, law enforcement, childcare and welfare personnel in an effort to reduce further trauma to child abuse victims in Rogers, Mayes and Craig Counties</i>	
Family Shelter of Southern Oklahoma, Victims of Domestic Violence Program	\$ 5,000	Youth Services of Tulsa, Broken Arrow Youth Court	\$ 5,000
<i>Funding towards support of the domestic violence/sexual assault victim's court advocate for Carter and Murray Counties.</i>		<i>Provision of funding for first offender youth court for the legal services portion of the program</i>	
Legal Aid Services of Oklahoma, Inc.	\$106,200	YMCA, Statewide Youth In Government Program	\$ 4,000
<i>Funding for operational expenses to provide access to civil legal services for low-income and elderly Oklahomans, statewide service area.</i>		<i>Funding of the Youth Model Legislative Day at the Capitol, 7th and 8th grade students, and student scholarships for Judicial Program Competition at the ABA in Chicago</i>	
Low-Income Taxpayer Legal Clinic at OILS	\$ 10,000	OBF Court Grant Awards	\$ 86,615
<i>Provision of statewide legal services for all low-income Oklahomans providing legal tax help and education through to tax court representation.</i>		<i>Technology project to improve administration of and access to justice in Adair, Beckham, Blaine, Cleveland, Custer, Harper, Hughes, Pawnee, Pittsburg, Pushmataha and Tulsa Counties</i>	
Marie Detty Youth & Family Services Center	\$ 12,000	Law Student Scholarships at All Three Law Universities	\$ 24,000
<i>Funding towards support of the domestic violence/sexual assault victim's court advocate in a six county area with emphasis in Comanche County and Fort Sill.</i>			
OBA-YLD Oklahoma High School Mock Trial Program	\$ 46,600		
<i>Overall program support in total for presentation of the high school mock trial program through to national competition, statewide coverage.</i>			
OCU School of Law, American Indian Wills Clinic	\$ 18,000		
<i>Funding for clinic staffing plus travel costs to provide legal services and further educate the legal community on complex Indian land issues in Oklahoma while providing law students with educational and professional development opportunities.</i>			
Oklahoma Lawyers for Children, Inc.	\$ 40,000		
<i>Funding to maintain legal assistance and advocacy to children for representation of traumatized innocent children in juvenile court and emergency showcase hearings in the state's largest county, Oklahoma County.</i>			
Senior Law Resource Center, Elder Law Educational/Outreach Program	\$ 12,000		
<i>Support for law-student elder law intern program providing research assistance, free legal services and educational outreach programs promoting informed diminished capacity, incapacity planning and financial exploitation while providing law students with educational and professional development opportunities</i>			
		TOTAL 2014 OBF GRANTS AND AWARDS, as of October 2014	\$457, 681
		GRAND TOTAL OF ALL OBF GRANTS AND AWARDS	\$11,535,049





Other Activities that Improve the Quality of Justice for All Oklahomans

Teens are easily influenced by peer pressure – some mistakes and choices can haunt you for a lifetime. A first line of defense is

available through **TEEN AND YOUTH COURTS** at the onset of problems. The goal is to reduce teenage misdemeanor offenses and increase the importance of being a good, productive citizen in society while students learn about the legal process and the seriousness of their offenses and actions. It is tough growing up and the OBF provides funding to better equip our youth to make positive decisions. \$129,500 has been provided for these important programs.

LAW STUDENT PROGRAMS provide crucial law-related services in the areas of immigrant rights, American Indian land and estate issues, and elder law while providing students with educational and professional development opportunities. \$976,494 has been provided for law student scholarships, research and legal clinics since 1984.



Other Activities that Improve the Quality of Justice for All Oklahomans Continued

\$101,725 plus thousands of hours of volunteer time have been provided for **PUBLIC LAW-RELATED EDUCATION PROJECTS**, most through participation in OBA community service activities.

Public service programs and projects, coupled with pro bono legal services, and participation in OBF funding programs

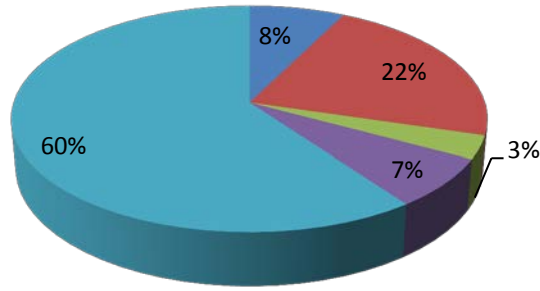
are some of the best ways for attorneys to illustrate the more compassionate side of lawyers working in concert to transform lives for the better. Your involvement will bring personal satisfaction by helping fellow Oklahomans and enhance the legal profession image. Participation and giving to the OBF is a win-win situation.



OBF President Dietmar Caudle at Caddo County District Court viewing technical equipment from OBF Court Grant award with District Judge Richard Van Dyke, Associate District Judge S. Wyatt Hill and Special District Judge David A. Stephens.

\$610,750 has been provided for **OKLAHOMA JUDICIAL PROJECTS** since 1984; most notable was the inauguration of the OBF Court Grant Program in 2009. Under the court grant program, technology grants to improve the administration of and access to justice are awarded to Oklahoma District and Appellate Courts through a vetting process conducted each year by Foundation Trustees. To date \$445,000 has been given across forty-four counties and the numbers continue to grow each year. Courts benefit; attorneys benefit; Oklahomans benefit. The OBF's court grant program is unique to Oklahoma and there is no other grant program like it across the nation.

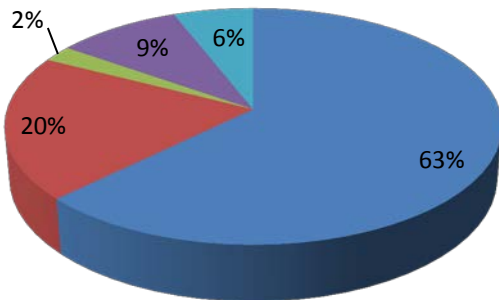
Revenue



- Fellows Support 106,340
- IOLTA 316,600
- Contributions and Other Support 47,300
- Interest and Dividends 101,300
- Net Realized and Unrealized gains on Investments 857,890



Expenses and Grant Awards



- Grants and Awards 491,815
- Administrative Support 155,000
- Depreciation 17,375
- General and Program Support 73,000
- Investment Management 46,750

How We Do It

The OBF accomplishes our mission each year through the generous support of contributors just like You.

Revenue comes from our Fellows Giving Umbrella Program, IOLTA, Cy Pres Awards, Investment Planning, Planned Giving through Bequests and Endowed Funds, and General Contributions. The OBF Fellows Umbrella Giving Program has expanded and in addition to the regular Fellows Program of giving, there is the new Community Fellows Program for organizations and groups.

The Fellows Program for individuals is comprised of the Fellow, Sustaining and the top tiered Benefactor levels. The Community Fellows Program has three tiers from which to choose consisting of Supporter, Partner and the top tiered Patron levels. All of the tax deductible giving programs are fully described and you can join today on the OBF website at www.okbarfoundation.org.



OBF Welcomes the Chickasaw Nation Foundation as a Community Fellow

OBF is the Charitable Heart



The Oklahoma Bar Foundation (OBF) represents the charitable heart of the Oklahoma Bar Association and its lawyer members. OBF works to rally you and our legal community around the OBF mission of, Lawyers Transforming Lives for the better through the promotion of justice, funding of critical legal services and advocacy programs, and advancement of public awareness and better understanding of the law. This mission is carried out by OBF grant awards that help to provide access to justice for tens of thousands of Oklahoma citizens each year, particularly the low-income and disadvantaged Oklahomans, who are in most crucial need of the protections afforded by our legal system.



OBF President Dietmar Caudle and OBA President Renée DeMoss celebrate OBF grant awards with their boards.

Why We Need You



With the number of people living in poverty at an all-time high, deep cuts in funding for legal aid are straining legal service programs and impacting communities across the State. Increasing numbers of Oklahomans are turning to our justice system for hope, but many will not be able to get there without law-related services. Your Bar Foundation takes a systemic line of attack in eliminating barriers by building support for pro bono programs, legal aid, law-related education and other important law-related service programs through grants, advocacy and other forms of support that will help to close the justice gap. Thirty-three different programs and projects were awarded grant funding during 2014 along with twelve law-student scholarship awards.



WHEN LAWYERS GIVE OF THEIR TIME AND MONEY, GOOD THINGS WILL HAPPEN. Will you please help by sending the best gift you possibly can to the OBF today! Online giving has been made even simpler through our OBF Website at www.okbarfoundation.org.

Thank you for your continued help and generous support. We can't do it every year without you and please remember – You're covered by the OBF.

While it is free to be a member of the OBF — to really feel it— you must be a Fellow!

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How You Can Help

- ✓ *Join the OBF Fellows Program for Individuals*
- ✓ *Become an OBF Community Fellow for Groups and Organizations*
- ✓ *Designate OBF for Cy Pres Awards*
- ✓ *Include OBF in Wills and Estate Planning*
- ✓ *Make OBF Tribute and Memorial Gifts*
- ✓ *Participate in the IOLTA Program*
- ✓ *Make General Charitable Contributions to the Oklahoma Bar Foundation*



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