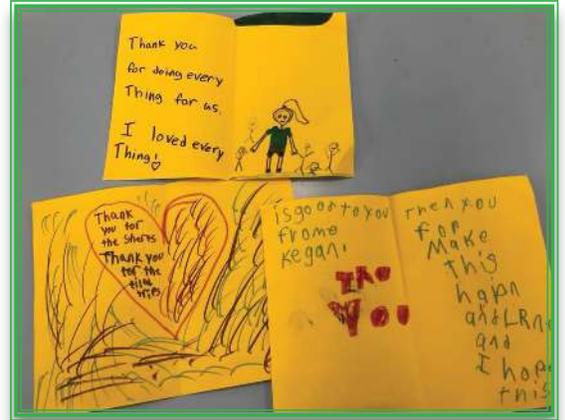




# GIVING TIMES

Foundation Management

WINTER 2018-2019



## Adventure Academy Launches in Vinita, Oklahoma

### Adventure Academy: Where Every Day is an Adventure in Learning

When Gail Campbell Cresap read about declining reading scores in her hometown, she wanted to help. Especially knowing that children who are not strong readers by the fourth grade face higher rates of poverty and other negative outcomes, she knew this was a cause she and her family's foundation wanted to help address.

The Cresap Family Foundation was able to work with Vinita Public Schools to pilot Adventure Academy, a summer learning program for local children. The focus was on reading and included work in science, math, drama, PE, technology, history and art as well as coordination with the district's ongoing literacy program.

"Seeing this opportunity in Vinita sparked an idea that we could do something to help children now," said Gail Campbell Cresap, co-founder and vice president of Cresap Family Foundation. "Investing resources for a summer camp, with the help of the school system, is making a difference right away and will ripple forward for years. We were delighted to see the results after just one year."

Working with the school district and elementary school principal, Mary Smith, the Cresaps and Foundation Management staff first met in December of 2017 to set goals, gather resources, and start to build a pilot program. Their primary purpose was to improve reading skills of all participants, and the group realized Adventure Academy would impact the community in other ways. This program, free to Vinita families, provided meaningful summer employment for teachers, funded field trips to give students new experiences, and helped families by giving students a worthwhile way to spend their time away from school.

With funding provided by the Foundation, coordination by Foundation Management, and expertise and resources from Vinita Public Schools, the program kicked off in May at Hall Halsell Elementary School, serving 60 students. The district provided space, access to buses, and breakfast and lunch

“Seeing this opportunity in Vinita sparked an idea that we could do something to help children now.”

Gail Campbell Cresap,

Cresap Family Foundation



Continued on page 3.





## Merrick Foundation Celebrates 70 Years

This year marks seven decades of giving for the Merrick Foundation. Established by Ward S. Merrick, Sr. as a memorial to his father, the foundation now has \$10.5 million in assets and has given over \$20 million in grants to more than 300 nonprofit organizations since its inception in 1948.

“My great-grandmother, Mrs. Elizabeth B. Merrick, wanted a way to continue my grandfather’s legacy,” says Frank Merrick, board member of Merrick Foundation and founder of Foundation Management. “What a testament to their investment that the foundation has grown to what it is today and that it now involves 16 family members, plus others. The family, now in its fourth generation since inception, has a board that never met its original funders but carries on their wishes and works together for the greater good.”

Honoring the life and work of F.W. Merrick, the Merrick Foundation gives to help Oklahomans by funding projects in human services, health and wellness, education and community development. The foundation has stayed true to its founder’s vision by focusing grantmaking in southern Oklahoma, and some statewide organizations that increase the quality of life for the state.

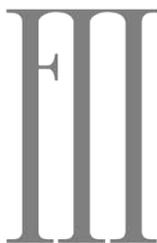
Their support of Oklahoma State University as OSU worked to improve the health of students at the Stillwater campus serves as an example of how focused grantmaking could be a model and encourage student health initiatives across the entire state. A core belief of the Foundation is to support self-sufficiency and the Foundation prefers grantmaking to support organizations that help customers/clients grow so that they no longer need the services the organizations provide.

“Being a third generation member and president of a family foundation brings me great pleasure and joy. Seeing the metamorphosis of the Merrick Foundation over the last 25 years has been amazing and rewarding. We adhered to our mission through four generations and we have excelled at it. Seeing our board actively involved in different forms of philanthropy outside their board duties shows me they have bought into the philosophy of giving back. The fact that our family members take an active role in our support of non-profits across Oklahoma gives me confidence in the future. For this I am most grateful,” says Rick Coe, current Merrick Foundation Board Chair.

Awarding grants to charitable organizations that foster independence and achievement, and stimulate educational economic and cultural growth is especially meaningful to the Merrick Foundation. Many years ago, the Foundation agreed to fund the feasibility study for the possibility of building a natural history museum. The study showed there was support from both University of Oklahoma donors and the City of Norman, ultimately resulting in the Sam Noble Museum of National History.

“The Merrick Foundation has helped launch programs, built sustainable initiatives through partnerships with strong nonprofits, and the best part is we are just getting started,” says Will Merrick, fourth generation board member and Vice President of Foundation Management. I only wish my great-grandparents could see what their initial investment has become.”

“Foundation Management Inc. has been such a vital part of our small family foundation. The staff has so much expertise in this field; they stay current on all regulations and achieve their goal of making grant giving enjoyable. They are simply THE BEST!”  
~Judith Harris Garrett, President, Harris Foundation





**“Act  
as if what you  
do makes a  
difference.  
It does.”**  
~William James

**Adventure Academy (continued from page one)**

through the USDA summer feeding program. To simplify billing, the Foundation wrote one check to the district and they processed all expenses to cover the remaining costs.

“Mary and I met monthly through the first part of this year,” says Kari Blakley, who acts as the Cresap Family Foundation grant manager through Foundation Management. “She identified teachers and students and developed the daily schedules and field trips to maximize time and get the best results.” The program included student pre- and post-tests and their standardized test scores will be tracked to measure longer-term outcomes.

“We are thrilled with the success of the Adventure Academy” said Smith. “We surveyed students, parents and teachers and the responses received were overwhelmingly positive. We are confident that this helped many students get back on track and even ahead of the curve for the school year ahead.”

The program celebrated its inaugural session less than a year after the idea was conceived, delivering eight weeks of learning to students who overwhelmingly raved about their time in this summer adventure. Plans are in place for summer 2019 and the group continues to add new experiences and watch for continued improvement with literacy in Gail Campbell Cresap’s hometown.

For questions about the program or to discuss ways to turn your dream into action, contact Kari Blakley to brainstorm, plan and start a change in your neighborhood.

*Contact Kari to start a change:*  
(405) 755-5571 or [kblakley@FMIOkc.com](mailto:kblakley@FMIOkc.com)

**FRANKLY SPEAKING**

On behalf of all of us at Foundation Management, we are grateful for the opportunity to work with you, making a difference for your foundations, for your missions and for your communities. We appreciate our long-time partnerships and we are equally excited about our newest clients and friends. Every day, we strive to make philanthropy more fun for each of you.

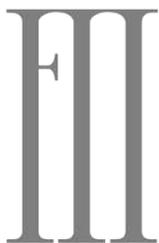
We hope you enjoy this edition of Giving Times. We love highlighting the work our clients—like the Adventure Academy, funded by the Cresap Family Foundation. We want you to get to know our staff even better and to share a little about the work our employees and agency partners are doing. Should you have any comments or questions regarding Foundation Management or Giving Times, please contact us.

Working in philanthropy changes lives. We enjoy our work and we love handling the details to make giving easier and more streamlined for your organizations and families.



Sincerely,

*Frank Whal*





**Ginny Evans**, who does accounting on most days, made a new friend while volunteering in the classroom at Special Care. Since responding to a community need and opening in 1985, Special Care, serves children of all abilities. Special Care remains the only organization of its kind in the state of Oklahoma and is one of a handful in the nation with comparable missions. Foundation Management and its clients have been supporters of this organization from the beginning, and the staff enjoyed spending time with them this summer.

### Getting to Know

## Kari Blakley

Kari Blakley loves helping people and making giving easier for clients. When she met Frank Merrick eight years ago, she never dreamed that her job as Executive Assistant would lead to her current role, working with diverse foundations and philanthropists, supporting life changing causes and improving lives. Kari and her husband, Able, and their daughter, Alice, are looking forward to the arrival of a baby boy and little brother later this year. Her family has grown at home, and with each new client, she feels like her work family expands. Kari's work includes meeting planning and facilitation, grant management, including making site visits and doing post-grant evaluations. She also provides 'behind the scenes' staff support for clients, assisting in any way that helps them accomplish their mission.



## Client Listing

### Private Foundations

Boyle Foundation  
 Bradstreet Foundation  
 Browning Kimball Foundation  
 Anonymous Foundation  
 Cresap Family Foundation  
 Cuesta Foundation  
 Esco Foundation  
 Harris Foundation  
 M&P Foundation  
 Merrick Foundation  
 Shaw Family Foundation

### Hospital Conversion Foundations

The City of Muskogee Foundation  
 Valley View Foundation

### Oil & Gas/Mineral Management

Ward S. Merrick, Inc.  
 Veja

*Consulting, specializing in generational transition and succession planning*

“FMI has helped the City of Muskogee Foundation transform the sale of a hospital into an all-encompassing charitable organization that helps the citizens of Muskogee. The Foundation staff has become a part of our community and really care about making a difference for present and future generations.”

~ Earnie Gilder, Chair of the Board  
 City of Muskogee Foundation



### Foundation Management Staff

Frank Merrick, President  
 Kari Blakley, Vice President  
 Will Merrick, Vice President  
 Robert Merrick, Chief Financial Officer  
 Sherrie Schroeder, CPA, Vice President of Accounting & Compliance Officer  
 Ginny Evans, Accounting Specialist  
 Laura Wickizer, Grants & Office Administrator, City of Muskogee Foundation  
 Jane Trench, Administrative Coordinator  
 Christina Hightower, Administrative Assistant