

11/17/84

I DON'T WANT TO WORK ON GETTING
MY PERSONAL IDEAS OR POWER
DELIVERED. BUT I DO WANT TO
HELP SOLVE THE PROBLEMS OF
THE 21ST CENTURY.

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THE CHARLES AND LYNN SCHUSTERMAN

FAMILY FOUNDATION SUPPORTS PROGRAMS

THAT SEEK TO ENRICH AND EXPAND JEWISH
COMMUNITIES IN THE UNITED STATES, ISRAEL

AND THE FORMER SOVIET UNION. THE

FOUNDATION ALSO PROVIDES ASSISTANCE TO
NON-SECTARIAN CHARITABLE ORGANIZATIONS

DEDICATED TO ENHANCING THE QUALITY OF
LIFE IN TULSA, OKLAHOMA, ESPECIALLY IN

THE AREAS OF EDUCATION, CHILD
DEVELOPMENT AND COMMUNITY SERVICE.

our MISSION

A MOST NOTABLE LIFE

The late Charles Schusterman, known to many as Charlie, lived a remarkable life. He was an intelligent and passionate man with great vision, a successful entrepreneur and philanthropist, who constantly pursued excellence and cared deeply about making a difference in the world. Charlie was also a loving husband, devoted father, adoring grandfather and committed Jew. And then there were his notes. Wherever he went, Charlie carried a freshly sharpened pencil and his familiar, unlined pad. As important concepts about life, business, leadership, health or philosophy crystallized in his impressive mind, he would craft a note to himself or someone close to him. He was always listening, thinking, analyzing and writing, often employing rules of spelling and grammar that were functional, if not conventional. Some notes were scribbled to help Charlie remember, others to help him clarify and understand. As a tribute to Charlie, and as a window onto the fundamental tenets of our philanthropic agenda, this report features a selection of those notes. Together, they help chronicle our past, explain our present and illuminate our future.

MESSAGE FROM THE PRESIDENT

Publishing an annual report is something many of us at the Foundation have wanted to do for several years. Each time the idea came before our board, however, the same person asked us to wait a little longer: my late husband, Charles Schusterman.

It was not that Charlie was opposed in principle to issuing an annual report. Like all of us at the CLSFF, he took great pride in the accomplishments of our grantees and the strength of their leadership. Charlie also recognized the importance of accountability on both sides of the philanthropic equation, for foundations and for those we fund. So, why did Charlie resist an annual report? “Because,” he told us, “we’re not ready.”

To Charlie, being ready meant understanding the broadest outlines and smallest details of every issue. He always wanted to gather and analyze as much data as possible before making a decision or taking action.

Trained as a petroleum engineer, Charlie was ready when he went into the oil business with his brother. He was also fully prepared when he forged ahead on his own by founding Samson Resources Company in 1971. After being diagnosed with leukemia twelve years later, he searched everywhere for information on the disease and fortified himself with knowledge before entering the experimental protocol that extended his life by almost two decades. And, during the additional years he enjoyed thanks to modern medicine and his overwhelming will to live, Charlie worked hard to discover all he could about philanthropy. “People learn from their

mistakes,” he used to say with a chuckle, “but I prefer to learn from the mistakes of others.”

His unquenchable thirst for knowledge and love of people led Charlie from boardrooms to classrooms, and from conferences to conversations into which he would draw those around him. He particularly enjoyed talking to young people, believing they possess a unique perspective on how to build for the future. And not only did he go and see and do, Charlie also read everything he could, always chiding himself for lacking discipline whenever he stuffed a nonessential publication into his briefcase to read at night

He was deservedly and
UNIVERSALLY RESPECTED
for his ability to assess and
manage risk... in business,
philanthropy and, of course, in
battling two fatal diseases.

or over the weekend. Charlie embodied information overload, as anyone who ever saw the piles of newspapers, magazines and industry newsletters he kept at our home and in his office can attest.

In the midst of all this activity, however, stood a focused man with a keen mind and relentless drive. He was deservedly and universally respected for his ability to assess and manage risk, a talent he displayed over and over again when confronted with new and daunting challenges in every aspect



Charles and Lynn Schusterman

of his extraordinary life – in business, philanthropy and, ultimately, in battling two fatal diseases.

Despite these illnesses and the debilitating side effects that followed, Charlie vigorously pursued a two-pronged philanthropic agenda with goals that were both visionary and achievable. First and foremost, Charlie wanted to ensure that a critical mass of engaged Jews live in North America in the 21st century and beyond. Only then, he was convinced, could his beloved Jewish people continue to have a positive impact on the world – to truly serve as a “light unto the nations.”

Charlie also felt a special loyalty to his hometown. He was deeply committed to helping local organizations that shared his desire to help people improve their skills and build better lives.

By the time he died last December, our family had already pledged and contributed more than \$50 million toward the two objectives Charlie had set for us in the early 1990s – over half of which was committed in just the last two years. The table around which we made our funding decisions had moved from our kitchen to a downtown office, and the people making those decisions had grown to include the members of our experienced professional staff. Charlie’s innermost thoughts about philanthropy and life, as well as the lessons he learned during his endless quest for additional knowledge, had been communicated to those of us he knew would survive him. And, for at least the next few years, our course had been charted.

Thanks to Charlie, we’re ready.

B’shalom,

A handwritten signature in cursive script that reads "Lynn".

Lynn Schusterman
December 2001

CHARLES SCHUSTERMAN

[1935 – 2000]



CHARLES

The youngest of four children, Charles was born on September 21, 1935, to Russian immigrants living in Tulsa, Oklahoma. Eight days later, as is customary in the Jewish religion, Charlie's parents ritually entered him into the covenant between God and the Jewish people. They also gave him a Hebrew name, *Bezalel*, one that turned out to be more prophetic than anyone could have foretold.

schusterman

“While no one person is obligated [to be *olam*], neither is anyone free to

Bezael was the man called upon to build a place for God here in the world and he did so by motivating others to contribute their possessions, talents and time to achieve a common goal that would strengthen and serve all Jews. As explained in the Torah, Exodus 31:1 – *Behold, I have called upon Bezael by name... and filled him with a divine spirit, with wisdom and understanding, and a knowledge of all craft, so that he might weave visions and build them...* These words, inscribed on Charles’ headstone, speak to who he was and how he lived his life.

Charlie and his siblings grew up humble but happy in an Orthodox Jewish household in north Tulsa, literally on the wrong side of the tracks. While a student at Central High School, young Charlie particularly enjoyed cheerleading and dating, a teenage pursuit he later characterized as “time well spent.” He studied occasionally, but was more likely to



be found playing poker to generate money for dating. In addition to being the lone Jewish member of his chosen high school fraternity, Charlie

also served as the Aleph Gadol (a position similar to president) of the local chapter of the international Jewish youth group known

as BBYO. He illustrated, years ago, that he was comfortable living a dual existence and carried it forward into his adult years.

Upon completing high school, and without much forethought, Charlie decided to venture 100 miles west of Tulsa to attend the University of Oklahoma. Upon his arrival in Norman, undeterred by the fact he had neglected to enroll in classes, Charlie quickly negotiated his way into school and began pursuing his degree in petroleum engineering.



The Charles Schusterman at OU differed by at least one important measure from the Tulsa schoolboy: At the university, Charlie channeled his passion for life into academics. He excelled as a student and graduated with honors in 1958, having been recognized as one of the Top 10 Freshmen and one of the Top 10 Seniors. Charlie left school with a desire to utilize his own capabilities to create something meaningful.

At age 19, Charlie lost his beloved dad. Being Sam’s son was a fundamental part of his personal identity, equaled in significance only by his deep-rooted appreciation for being Jewish. In 1971, the depth of his paternal connection was enduringly honored when Charlie chose the name *Samson* for the daring enterprise that would bring him fame and fortune in the energy business. Many years later, just weeks before he died, Charlie again chose to honor the memory of his father by

to complete the task [of *tikkun* desist from it.” *PIRKE AVOT* (*Ethics of the Fathers* 2:16)

adorning a new, Schusterman-supported cultural center in the heart of Jerusalem with its official name: *Mercaz Shimshon*, Hebrew words meaning “Samson Center.”

Immediately following graduation from OU, Charles began service in the U.S. Army at Fort Lee, Virginia. Upon his return to Tulsa in 1961, using \$30,000 from his mother, he joined his brother Dan in the oilfield salvage business. While working long hours to grow the company, Charles had the good fortune to go on a blind date with an equally energetic, Missouri-born woman then living in Oklahoma City. Lesser women than Lynn Josey would not have tolerated his tardiness – he arrived three hours after the appointed time for their first date – owing to an important project in the oilfield.

Being Sam’s son was a
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identity, equaled in significance,
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appreciation for **BEING JEWISH**.

In the joy-filled year that they dated, the future Mrs. Schusterman received subtle hints about what life would be like married to Charlie. He was fiercely motivated in everything he undertook, measuring personal accomplishment by the success of his business

endeavors. He was uncommonly open-minded, willing and ready to learn from every credible source. And he was a proud Jew, keenly interested in Judaism and its vitality throughout the world. Lynn found this witty and



Charles and Lynn Schusterman

vigorous man uniquely engaging, whether displaying affection for his hometown, expressing his boundless ambitions or enlisting her assistance to make face-to-face solicitations for the United Jewish Appeal.

The couple married in 1962 and became parents to two sons and a daughter. In the decade that followed, Charles and Lynn worked constantly toward the goals they set for themselves. They sought balance in their maturing partnership, growing their business, being active in their community, and through it all, ensuring that children Hal, Stacy and Jay received plenty of attention, guidance and love.

Nine years into their marriage, and with a Tulsa home full of fast-growing responsibilities, Charlie determined that the time was right to put their future on the line. He

decided to acquire more marginal oil properties in a single transaction than ever before. At enormous risk to himself and his partners, Charlie bought the California oil properties owned at the time by the Amerada Hess Corporation and launched a bold, new enterprise to operate them.

His timing could not have been better. Thanks to Charlie's prescience in closing the Amerada Hess deal, Samson found itself very well positioned to grow when the Arab oil embargo of 1973 led to rising crude prices. A few years later, Charlie saw promise in another aspect of the energy business and made drilling for natural gas one of Samson's core strategies.

Through the boom years of the '70s and the bust of the '80s, when many of Samson Resources' counterparts dwindled or disappeared completely, Samson and its related entities grew. Slowly and thoughtfully, Charlie had built an extraordinary corporate staff, a group he regarded as an extended family. By the late 1990s, Charles was at the helm of one of the largest independent exploration and production businesses in the entire nation. Today, Samson's interests include properties



Charles celebrates another victory by Samson in Tulsa's "Corporate Challenge," the nation's largest community-based corporate athletic competition.

in 18 states. It also operates in Canada, South America and Russia.

By itself, the emergence of Samson as a strong, savvy and technically adept oil and gas operator is an impressive story. In light of the life-altering challenges being faced every day by CEO Charlie Schusterman, it is a tale that borders on incredible.

In 1983, at age 47, Charlie was diagnosed with chronic myelogenous leukemia (CML), an incurable disease. He was also told that, at best, he would live three years because CML had no accepted treatment protocol.

Charlie confronted his illness as he had every other important challenge in his life.



Charles (second from right) and other Samson executives in 1987.

He went to work employing his special blend of tenacity, creativity and focus. Charlie gathered, studied and analyzed as much CML data as possible, talking to experts and otherwise learning all he could about the disease that threatened his life. Two months of exhaustive research led him to Dr. Moshe Talpaz at the M.D. Anderson Cancer Center at the University of Texas in Houston.

Under the careful watch of Dr. Talpaz, Charlie began an experimental protocol that produced one of the early breakthroughs in the treatment of CML. His medical regimen included daily injections of human interferon and later added low-dose chemotherapy. Ironically, a side effect of the same interferon that helped fight CML so successfully led Charlie to develop a second fatal illness, interstitial lung disease (ILD), from which doctors believe he ultimately died.

Even in weakened health, the indefatigable Oklahoman, always supported by his wife, continued to build his business, perform community work, spend quality time with his family and even exercised with characteristic vigor. Upon Charlie's induction into the Oklahoma Hall of Fame in November 2000, Melvin Dow, a close family friend, poignantly characterized him as "the poster child for never giving up."

Charlie drew wisdom and inspiration from every conceivable source: Lynn, his children and extended family, friends, business associates and even Dr. Seuss, whose stories he enjoyed reading to his children and grandchildren. One of Charlie's favorites books was *I Had Trouble in Getting to Solla Sollew*, in which Dr. Seuss spins the tale of a furry, nameless hero whose life is riddled with "troubles of more than one kind.



"Poppy" reading to his granddaughters at bedtime.

Some come from ahead and some come from behind." In the course of the story, the hero learns the value of facing problems head on. At the end, with his new attitude, he exclaims, "Now my troubles are going to have trouble with *me*."

And so it was for Charles Schusterman. For the last 18 years of his life, Charlie gave his troubles trouble – battling cancer, lung disease, open-heart surgery and innumerable other health problems as he managed the business known today as Samson Investment Company.

A particularly debilitating side effect of his years of medication was peripheral neuropathy. It precluded Charlie from being anywhere with a temperature above 68 degrees. Exposure to warmer temperatures caused intense pain in his feet, head and hands. The higher the temperature, the greater the pain and the more risk of brain damage. Only during winter and on his annual trips to the cool climates of the Pacific coast could Charlie be outside for long periods. The rest of his life was spent indoors in the safety of air conditioning. He became known not only for his uncommon courage, unconquerable wit and a tremendously optimistic outlook, but also for very cold offices and short sleeve shirts.

His extreme sensitivity to heat caused Charlie to change more than his lifestyle.

When first diagnosed with CML, Charlie told only his immediate family and a few very close friends. He wanted to allow those who would succeed him at Samson time to mature without extra pressure. It was not until his peripheral neuropathy forced him to change his daily routine that he removed the cloak of secrecy hiding his condition. With his CML now revealed, he became a role model for others with fatal diseases by speaking publicly about the power of positive thinking and the potential of the human spirit.

What Charlie created for himself was hope. For the benefit of others, he joined with Lynn to create the Charles and Lynn Schusterman Family Foundation (CLSFF).

The CLSFF was established in 1987 during some of the most trying times of Charlie's battle with leukemia. Right from the start, Charlie wanted the Foundation to mirror his personal business style – thoughtful, serious and efficient. He wanted to be known as a detailed funder, someone who insisted that his rules be known and followed. “By our participating with a non-profit or our recommending it,” he wrote in one of his notes, “we want that to be considered a stamp of approval for others to do the same.” Over time, this desire to provide what Charles called “positive leadership” is what led the usually private Schusterman family to begin lending its name to the buildings and programs of those organizations with which the Foundation is most closely affiliated.

Working closely with Lynn every step of the way and using lessons learned from his other experiences, Charlie embarked upon his philanthropic journey convinced that his business-like approach would yield the greatest results. Even before he familiarized himself with emerging trends in philanthropy,



OU President David Boren, Lynn and Charles, and OU-Tulsa President Ken Lackey at the dedication of the Schusterman Center.

Charlie had incorporated due diligence, accountability, benchmarking and evaluation as integral parts of his original strategic vision. He also understood the importance of committing time – what Charlie called “human resources” – as well as money to the organizations he chose to support.

He also placed a high priority on directing his funding to organizations with strong, competent leadership teams. The extent to which he was prepared to make a particular grant often depended more on his assessment of the quality and management ability of its lay and professional leadership than on the specific program being discussed. “There are lots of good ideas out there” and “There’s nothing new under the sun” were the two expressions he most often used to emphasize that ideas alone were not enough. Excellent implementation, he felt, was the real key to success in every endeavor.

Another important business principle Charlie brought to his philanthropy was the concept of leverage. Whenever possible, Charles sought to forge alliances with service

providers and other foundations. He was committed to finding the most effective and efficient ways for the CLSFF to work in partnership with others, firmly believing that joint ventures could reduce redundancy and create synergies. Not only did Charles recognize the potential of philanthropic partnerships, he thoroughly enjoyed the meetings and discussions he shared with other major philanthropists to set policy and oversee the activities of such collaborations.

Charlie spent most of his philanthropic time, energy and resources on exploring ways to perpetuate the existence of the Jewish people. He had an overarching commitment to the vitality of Judaism and, along with Lynn, made the search for ways to enliven, energize and expand the reach of Judaism, particularly for the unaffiliated and the intermarried.

The loyalty and fervor that Charlie felt for Judaism is hard to overstate but easy to misconstrue. He was neither exceedingly nor overtly spiritual. Charlie rarely quoted from Jewish texts and generally found traditional religious services to be boring and uninspiring.

But Charlie was a Jew to the core. His own Jewish heritage informed every facet of his being – family, work, religious observance at home, recreation and, naturally, philanthropy. He was convinced that his Jewishness helped him achieve success in all dimensions of his life, as it has contributed throughout time to the achievements of other Jews. “Our unique history has acculturated us to do special things in the world,” he once wrote in yet another note to himself. How else, Charlie mused, could a people so few in number have such a dramatic and positive impact on civilization?

According to Jewish tradition, God could have created a perfect world, but deliberately decided not to do so, so that mankind could be God’s partner in repairing the world, an act called *tikkun olam*. Charlie took seriously this Biblical imperative and fully accepted the responsibility best explained by the great sage, Rabbi Tarfon: While no one person is obligated to complete the task [of *tikkun olam*], neither is anyone free to desist from it.

For Charlie, who left his position as the co-CEO of Samson just two months before his death, retirement was not about rest. He viewed it as an opportunity to devote even more of time to philanthropy and his beloved Jewish people. Like Honi in the famous Talmudic story around which Charlie and Lynn chose to develop the logo of their foundation, Charlie looked forward to planting more trees and growing more fruit for the benefit of future generations.

In honor of *Bezalel* and his unique calling, as well as of his love for Lynn, their children and grandchildren, his friends, employees, his community and the Jewish people, the CLSFF is committed to carrying on Charlie’s important philanthropic work.



CHARITY BONDS FOR CS

3/14/91

I LOVE EDUCATION AND THE
DESIRE TO HELP PEOPLE BUILD A
BETTER MORE PRODUCTIVE FUTURE.
IF YOU CAN GET A BRIGHT & TALENTED
MIND AT A YOUNG AGE YOU'VE
GOT A LOT TO WORK WITH.

IT IS GREAT IF IT CAN BE
ASSOCIATED WITH ISRAEL.

I WOULD LIKE TO EXPAND THE
AGENDA OF GETTING YOUNG PEOPLE
INVOLVED IN POLITICS.

HOW TO APPLY FOR A GRANT

In the early days of the Foundation, Charles Schusterman once filled out a survey seeking information about the CLSFF by indicating that it made grants “from \$10 to \$1,000,000.” When it was suggested to Charlie that such a response could result in the Foundation receiving thousands of unsolicited requests, he replied, “That’s exactly the point.” He wanted to explore a wide variety of funding opportunities and gain a better awareness of the latest trends in the non-profit community.

In addition to encouraging potential grantees to submit proposals, Charles and Lynn frequently went out and, based on their own knowledge, involvement or interest in a cause, offered an organization their financial support.

The Schustermans’ philanthropic activism is perhaps best illustrated by the circumstances surrounding their decision in 1999 to award a multi-million dollar grant to the University of Oklahoma.

Upon reading in the newspaper that OU was having difficulty concluding its negotiations to acquire and transform the 60-acre BP/Amoco Research Facility into a new educational center for Tulsa, the couple decided to see if they could help. Charles telephoned OU president David Boren to learn more about what the university hoped to achieve for Tulsa in the years ahead.

Satisfied by the response he received, Charlie immediately offered a five-year, \$10-million commitment to cover a substantial portion of the purchase price. No formal request was ever issued and no formal proposal was ever received.

The Foundation intends to continue the strategy of initiating projects in areas of particular interest to its board of directors. At the same time, the CLSFF also encourages the submission of applications consistent with its mission and conforming to the following guidelines.

Eligibility

The CLSFF makes grants only to nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Service Code. Approximately 75 percent of its annual giving is directed to qualifying Jewish organizations that operate in Tulsa, throughout the United States and, to a lesser extent, in Israel and the former Soviet Union. The remaining 25 percent of Foundation grants are generally issued to non-sectarian groups that focus on education, children and community service needs in Tulsa, Oklahoma. The CLSFF will also consider applications from statewide educational programs that include Tulsa in their catchment area.

The CLSFF seeks to fund programs that, if proven successful, can generate their own long-term community support and be replicated by other organizations. Projects that leverage charitable dollars to meet community needs and eliminate redundancies, including by merger or other form of consolidation, are also of special interest to the Foundation.

Applications for program, capital and general operational support will be considered, although grants are rarely given for general operational support to organizations with which the Foundation has no previous funding

history. The CLSFF will also entertain requests for funding in a number of non-traditional types of support such as direct technical assistance, fundraising, management and programming.

Each applicant is expected to provide evidence of its commitment to programming excellence, sound organizational and financial management, planning and the active participation of a knowledgeable and dedicated volunteer board of directors. The organization should be able to demonstrate that it has established a solid track record of support from its clients, volunteers and community. In an effort to minimize a duplication of effort, applicants are also encouraged to work in collaboration with other organizations to produce meaningful and successful programs.

Proposals that seek funding for up to three years will be considered. Multi-year commitments are conditional, however, upon satisfactory performance and are subject to an annual review. Recipients may be required to submit an annual, updated application to qualify for years two and three of such grants.

The CLSFF does not provide financial support for –

- Non-sectarian programs in communities other than Tulsa;
- Local programs in Jewish communities other than Tulsa;
- Endowments;
- Grants to individuals;
- Program deficits or debt reductions;
- Programs more appropriately funded by a governmental agency; or
- Grants that would impose “expenditure responsibility” on the CLSFF.

The grant policies, guidelines, programs, application requirements and funding decisions are the sole responsibility of the CLSFF board of directors. The board reserves the right to modify these policies at any time.

Applying for a Grant

The CLSFF accepts and reviews applications throughout the year. Organizations applying for a grant should follow these steps:

- A. Obtain a CLSFF grant application cover sheet from the Foundation’s Web site (www.schusterman.org) or request a copy by U.S. Postal Service or electronic mail.
- B. Complete the cover sheet and attach the required narrative and budget information.
- C. Submit the signed, original package by mail or delivery service to the attention of the Foundation Grants Manager.

The CLSFF grant application cover sheet has been designed to make the submission process as easy as possible. The initial application will enable the Foundation to determine whether there is sufficient interest in a project to request a full proposal or, as is true in many cases, to award a grant on the basis of the initial application and a follow-up discussion between a CLSFF staff member and the applicant. In most cases, applicants will receive a Foundation response within 45 days of receiving an application. When it is determined that a full proposal is necessary, it must include the following components.

A. Description of Organization (Limit of one typed page)

1. Background of organization
2. Mission and objectives

3. Target client group(s)
4. Type(s) of program(s) offered
5. Number of staff

B. Description of Project

(Limit of one typed page)

- Need for the project and how the need was determined
- Plans and timetables for implementation
- Staffing requirements
- Means for evaluating the results of the project
- Expected outcomes

C. Financial Information

- Actual and projected expenditures and revenues of the organization for the past, current and upcoming fiscal years
- Actual and projected expenditures and revenues of the project for the past (where applicable), current and upcoming fiscal years
- Plans to sustain funding for the project upon the expiration of the proposed grant
- A complete copy of the applicant’s most recent certified independent audit
- A list of other funding sources committed to or considering support of the project

D. Legal Information

- A copy of the IRS 501(c)(3) tax-exempt determination letter issued to the applicant
- A list of names and professional affiliations of directors, trustees and board officers, with an indication of which officer will provide the contract signature

Proposals should be submitted in a simple, readable format. Elaborate proposals are discouraged and should not be bound in notebook form or inserted in protective covers. Proposals may be sent by fax or email *only if all required attachments are included with the initial submission*. Otherwise, all proposals should be sent via the U.S. Postal Service or other delivery service.

While no application or proposal will be shared without permission from the applicant, no application or proposal will be returned once it has been submitted.

Requests That Are Denied

Given the large number of applications and wide range of program ideas that the CLSFF receives each year, not all of the important and worthwhile projects that come to its attention can receive funding. Accordingly, an unsuccessful application should not be regarded as a reflection on the quality of the grant request or applicant organization.

For More Information

For additional information or to discuss potential applications, you are invited to contact the CLSFF Grants Manager by phone at 918-591-1090, by mail at P.O. Box 51, Tulsa, Oklahoma, 74101 USA, or via the Web site at www.schusterman.org.

1962

Charles Schusterman and Lynn Josey marry and begin their family, ultimately becoming parents to two sons and a daughter.

1971

Charles acquires California oil properties and forms Tulsa-based Samson Resources Company. Over the next 30 years, Samson grows to rank among the largest independent energy exploration and production companies in the United States.

1983

Charles is diagnosed with chronic myelogenous leukemia and told his life expectancy is three years. Business, family and personal philanthropic activities accelerate, even as he battles disease and the debilitating effects of therapies.

1984

Charles and Samson Resources are featured in *Fortune* magazine.

1986

Charles plays a leadership role in creating the American Israel Education Foundation. He is instrumental in the development of its programs to inform North American students of the importance of the U.S.-Israel relationship.

1987

Husband and wife establish the Charles and Lynn Schusterman Family Foundation. They give it a distinctive mission and urgent philanthropic agenda.

1989

Construction begins in Jerusalem on the Schusterman Campus of the Israel Arts and Science Academy, recipient of the first multi-million dollar grant from the Foundation.

1992

The Schustermans respond to the call from the United Jewish Appeal to support Operation Exodus II. Their support helps Israel absorb and retrain hundreds of Jewish scientists fleeing from the former Soviet Union to serve as high school science teachers.

1993

The CLSFF makes its first and only endowment gift, establishing the Schusterman-Josey Chair in Judaic History at the University of Oklahoma. In Tulsa, a grant from the CLSFF enables Planned Parenthood to open its Westside Clinic.

1994

A three-year, \$1 million grant marks the beginning of a fruitful relationship between the Foundation and Hillel, a partnership that grows to include the American Jewish Joint Distribution Committee in the launching of a program for college-age Jews living in the former Soviet Union. In Tulsa, the Foundation hires the first full-time member of its staff and assists underprivileged schoolchildren by joining with the Community Action Project to form the Partnership for the Availability of School Supplies.

1996

In October, the Schustermans travel to Jerusalem to dedicate *Succat Shalom*, a residential treatment center for at-risk children and their families for which the CLSFF provided the lead gift. One month later, the CLSFF allocates \$500,000 to help build a similar local facility, the Schusterman Parent Child Center of Tulsa.

1998

The cornerstone is laid in Jerusalem for *Mercaz Shimshon*, the Samson Center, a cultural facility and world headquarters for Reform and Progressive Judaism.

1999

The CLSFF launches STAR (Synagogue Transformation and Renewal), a philanthropic partnership conceived by the Schustermans to promote Jewish renewal through the synagogue. In December, the Foundation announces a major grant to the University of Oklahoma to help establish a new education and research campus in Tulsa.

2000

Charles retires as CEO of Samson Investment Company to devote more time to philanthropy. Lynn and Charles are inducted into the Tulsa Hall of Fame. Charles enters the Oklahoma Hall of Fame, which recognizes his accomplishments and generosity. Charles dies on December 30. The *Tulsa World* mourns the loss of a homegrown benefactor, “truly one of a kind.” Two former Prime Ministers of Israel laud Charles. Benjamin Netanyahu deems Charles’ wisdom and generosity to be “legendary,” while Ehud Barak writes that memories of this “strong and unique man... and his great commitment to community will continue to be an inspiration to us all.”

2001

Under Lynn’s leadership and with a staff of eight in Tulsa, the Foundation opens a satellite office in Washington, D.C. from which the CLSFF is leading the effort to achieve independence and self-sufficiency for the B’nai B’rith Youth Organization.

The Foundation In Action

In establishing their family foundation in 1987, Charles and Lynn Schusterman gave powerful expression to two passions that, in combination, defined their distinctiveness. At the same time, they equipped themselves and their successors to be effective in their enduring dedication to *tikkun olam* – repairing the world. Today, the Charles and Lynn Schusterman Family Foundation (CLSFF) is a local organization with a global vision, providing support to a wide range of charitable and educational activities in communities throughout the United States, Canada, Israel and the former Soviet Union.

Judaism was an essential aspect of Charles’ life since childhood but it did not take on special importance to Lynn until later in life. Lynn knew little about Judaism before she met Charlie, whose affection for the Jewish people proved contagious. Lynn’s appreciation grew gradually throughout the years of their extraordinary partnership until, in her own words, she too “fell in love with being Jewish” during a family trip to Israel in 1977.

Immediately upon returning from that pilgrimage, the Schustermans greatly increased their involvement in Jewish life on the local and national levels. With anti-Semitism no longer posing a major problem for American Jewry, Charles and Lynn focused their attention on providing for Israel’s safety and security. They began working more closely with local Jewish institutions. They also increased their

giving to the Jewish Federation of Tulsa for the United Jewish Appeal.

They became very involved in the American Israel Public Affairs Committee (AIPAC). For years, and particularly during the period Charles served as an AIPAC officer, the Schustermans traveled to Washington monthly and Israel several times each year to help cement the U.S.-Israel relationship. Convinced that the lack of political influence within the American Jewish community contributed to the horror of the Holocaust, Charlie and Lynn vowed to do whatever they could to make certain the American government would never again cast a blind eye toward the Jewish people. Today, the Schusterman family’s commitment to AIPAC and the pro-Israel agenda remains as strong as ever.

**From the SEAMLESS MERGING
of interests in seemingly
dissimilar groups – Jews and
Oklahomans – the CLSFF
derives not only its UNIQUE
charter, but also its
DISTINCTIVE character.**

By the mid-1990s, with Israel clearly prevailing in both its fight to exist among hostile neighbors and in its struggle to strengthen its economy, the Schustermans channeled their primary attention to what they believed to be the paramount challenge confronting world Jewry as it entered the new millennium: the survival of non-Orthodox Judaism outside of Israel.

To help Jewish life in the Diaspora thrive, not merely survive, the Schustermans

redirected their vision, energies and resources. They sought to find ways to serve a broader, more diverse array of men and women for whom a link to the past – including the horrors of the Holocaust and the miraculous development of the State of Israel – is an insufficient reason to remain, or choose to be, Jewish. Looking to the future rather than the past, the Schustermans focused their attention on children and young adults.

The Schustermans determined that until a united Jewish community committed itself to transforming all of its major institutions into centers of excellence, Judaism would be denied a legitimate chance to compete in the marketplace of ideas and assimilation would continue to increase. Left unaddressed, this situation could result in the number of non-Orthodox Jews living outside of Israel spiraling downward until only a handful remained and the positive influence of the Jewish people all but disappeared.

The Schustermans' concern about the future of the Jewish people led them to allocate not less than 75 percent of their giving to projects designed to fight assimilation and address issues relating to Jewish renewal. By promoting these types of efforts, the Schusterman family hopes to ensure that a critical mass of engaged Jews live Jewish lives in North America in the 21st century and beyond.

The remaining 25 percent of the funds contributed by the Foundation is distributed locally. The Schustermans maintain a lifelong affection for their home state of Oklahoma, and especially for the resilient, hard-working and optimistic people of Tulsa. The Foundation has always demonstrated a constant

and intentional dedication to people and programs, particularly when focused on children, education, disadvantaged families and community services, that can measurably enhance the future of those in the Schustermans' hometown.

When and where appropriate, the Foundation also facilitates the exchange of information and ideas between organizations pursuing parallel missions in Israel and Oklahoma. As a result, educators from Oklahoma City and Jerusalem have visited each other, compared notes and shared insights on the best ways to offer after-school enrichment programs for students in middle school. Experts in the prevention and treatment of child abuse field from Tulsa and Tel Aviv have also begun a dialogue, which has led to the implementation of programs learned from far-away friends and colleagues.

From the seamless merging of interests in seemingly dissimilar groups – Jews and Oklahomans – the CLSFF derives not only its unique charter, but also its distinctive character. With the following grants now serving as prologue, the Foundation looks forward to pursuing its mission of helping to make the world a healthier and better place for all.



The tzedakah box that the Schusterman family uses every Friday night at Shabbat dinner.

CHRISTIAN PHILOSOPHY

9/2/96 WE WANT TO BE KNOWN AS
A THOUGHTFUL, SERIOUS, EFFICIENT FOUNDATION.

BY OUR PARTICIPATING WITH A NON-PROFIT
OR OUR RECOMMENDING IT, WE WANT THAT
TO BE CONSIDERED A SIGN OF APPROVAL FOR
OTHERS TO DO THE SAME. THIS IS POSITIVE
LEADERSHIP

Across The United States

The CLSFF has funded a carefully selected array of programs, participated in numerous partnerships and initiated many activities designed to otherwise strengthen the American Jewish community.

Many are the ways people of varied ages and backgrounds can participate in the North American Jewish community, and no single foundation or entity can effectively cover the Jewish landscape by itself. That is why the Foundation is a partner in a wide range of philanthropic activities, each of which focuses on a distinct aspect of contemporary Jewish life. Great potential exists in the sharing of responsibility among philanthropic partnerships and other Jewish communal organizations.

Partnerships

Major Jewish donors and family foundations have emerged as powerful forces for change in the Jewish community. Acting independently and increasingly in partnership with one another, these philanthropists are helping to craft bold visions and implement new initiatives to foster Jewish renaissance and unity. The initial success enjoyed by several partnerships has inspired similar collaborations to address needs in other areas of Jewish life.

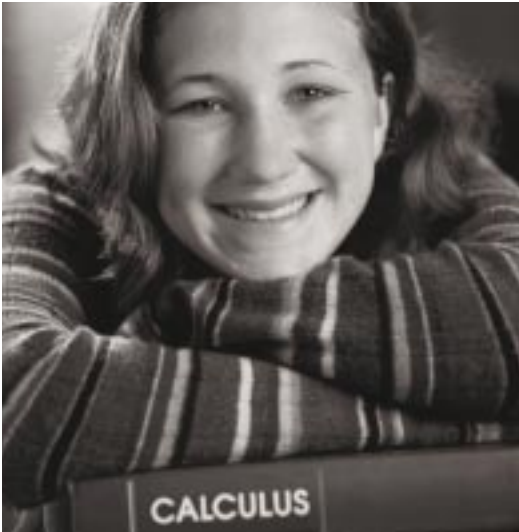
Cognizant of the pivotal role day schools can play in the formation of strong Jewish identities, the CLSFF joined eleven other partners in 1995 to create the **Partnership For Excellence in Jewish Education (PEJE)** to assist individual schools and advance the

cause of day school education in Jewish communities throughout North America. Each of the original PEJE partners agreed to contribute \$1.5 million to the organization during its first five years of operation. Virtually all of these founders, as well as several new partners, have agreed to give an additional \$1.5 million to help PEJE continue its critical work for at least another five years.

Charles Schusterman served as the president of PEJE from its creation until his death. In his memory, PEJE recently established the **Charles Schusterman Small Communities Enhancement Program for Jewish Day Schools**, a special project designed to assist schools in communities with small Jewish populations and where access to Judaic expertise is limited.



In its first five years of existence, PEJE has helped to establish or expand more than 50 Jewish day schools throughout the United States and Canada.



The Curriculum Initiative helps provide Jewish students in independent preparatory schools with meaningful Jewish experiences during their high school years.

A longstanding advocate of outreach to intermarried and unaffiliated Jews, the CLSFF joined the **Jewish Connection Partnership** (JCP) in 1998. The JCP, a project of the Jewish Outreach Institute, is a funding collaborative that supports programs and activities that help Jewish institutions engage intermarried and unaffiliated Jews at the local level. Included among JCP-funded projects are programs that link geographically isolated Jews with nearby Jewish communities, provide opportunities for social action in a Jewish setting and coordinate holiday celebrations. All nine JCP partners contribute a minimum of \$75,000 each per year to the effort.

Another partnership the CLSFF joined



The opening of the STAR summit held in September 2000.

in 1998, **The Curriculum Initiative** (TCI), seeks to provide Jewish students in independent preparatory schools with meaningful Jewish experiences during high school. More than 60 of the most prestigious schools in the nation have participated in TCI seminars that expose teachers to the benefits of using the *hevruta* (paired) style of Jewish learning and encourage the incorporation of Jewish ethics, values and events in educational programs and extracurricular activities. The Foundation has committed \$300,000 to TCI since becoming a partner in this project.

In 1999, Charles Schusterman persuaded Edgar M. Bronfman, Sr. and Michael Steinhardt to join him in **STAR** (Synagogue Transformation and Renewal), a new partnership focused on what many consider to be the primary gateway to Jewish life: the synagogue. Through its involvement with STAR, the Foundation hopes to help congregations of all denominations realize a vision of excellence.

In its first 18 months, STAR founders researched and deepened the organization's understanding of the role of the synagogue in modern American Jewish life. The STAR partners commissioned several studies and convened regional meetings involving representatives of every stream of Judaism to explore the challenges faced by North American congregations. They discovered that some synagogues have succeeded in transforming themselves into centers of energy with the ability to transmit the rich intellectual and spiritual quality of Judaism, teach Jewish history and values, perpetuate Jewish tradition and respond to essential human needs. Far more congregations, however, were searching for innovative and effective ways to increase membership and participation.

At a national conference of congregational leadership convened by STAR in September 2000, Charles set forth a multifaceted, five-year agenda for the new alliance. He also announced that the Foundation would contribute more than \$11 million of the \$18 million provided to STAR. Funds will be directed toward the issuance of challenge grants, the creation of an Internet-

In 1999, the Foundation decided to form a NEW PARTNERSHIP, focused on what many consider to be the primary gateway to Jewish life: the SYNAGOGUE.

based synagogue “supersite,” the strategic development of specially trained synagogue consultants and the exploration of ways to help congregational leadership use emerging technologies.

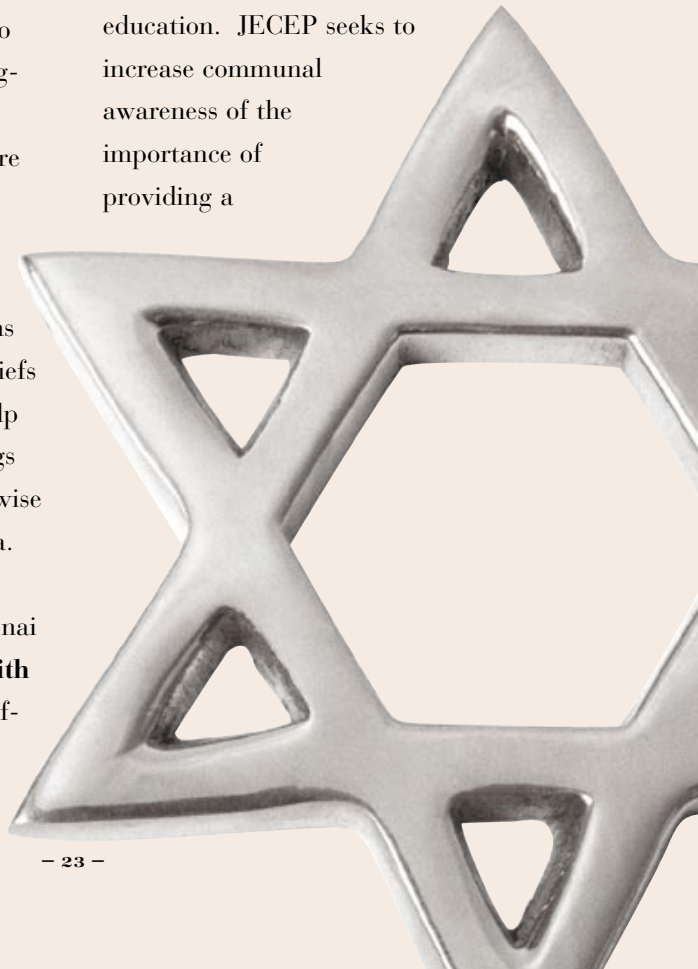
The pilot phases of these initiatives are currently underway. The CLSFF is cautiously optimistic that STAR will be successful in helping to transform hundreds of congregations into institutions to which Jews of all backgrounds and beliefs will flock to enhance their spirituality, help others in accordance with Jewish teachings and ethics, engage their minds and otherwise contribute to Jewish life in North America.

At the same time it was launching STAR, the CLSFF began working with B’nai B’rith International to help the **B’nai B’rith Youth Organization** (BBYO) create a self-governing, self-sustaining organization capable of delivering the financial and

programmatic support needed for its programs to flourish in the years ahead.

Founded in 1924, BBYO is one of the oldest Jewish youth movements in the world. With approximately 20,000 members, it is also one of the largest. The mission of this youth-led, transdenominational organization is to connect Jewish teens, assist them in developing and realizing their leadership potential and help them mature into healthy adults with positive Jewish identities. To date, the CLSFF has contributed more than \$500,000 and dedicated significant human resources to BBYO. The Foundation is also prepared to provide additional funding to BBYO as its transition to independence continues.

In early 2001, the CLSFF and five other partners formed the **Jewish Early Childhood Education Partnership** (JECEP), the only national organization dedicated exclusively to raising the status of Jewish early childhood education. JECEP seeks to increase communal awareness of the importance of providing a





CLSFF is working to increase communal awareness of the importance of providing a quality, innovative and meaningful Jewish education for Jewish children in pre-school programs.

quality, innovative and meaningful Judaic education for children in pre-school, one of the most influential entry points into Jewish life for many children and their families.

Several months later, the Foundation joined **Spark: Partnership for Service**. The two-part mission of this newly created initiative is to enhance existing community service programs within the organized Jewish world while simultaneously giving young Jews a Jewish context for their involvement in secular volunteer programs. By expanding the number of Jews engaged in community service and helping them gain an appreciation for the Jewish values inherent in those activities, members of Spark hope the organization's efforts will lead to an increased level of Jewish engagement. Each of its five founding partners is contributing \$75,000 per year to Spark.

Campus Activities

The college years are a highly impressionable period during the life of a young adult. They are a time of enlightenment and experimentation, a point at which young people often begin to make the choices that will guide them throughout the rest of their lives. Convinced that finding ways to strengthen

Jewish identity and increase Jewish awareness among university students is critical to assuring the future of the Jewish people, the CLSFF devotes significant resources to campus-based programs in the United States, Canada, Israel and the former Soviet Union.

Founded in 1923, **Hillel: The Foundation for Jewish Campus Life**, offers college students numerous opportunities to explore and celebrate their Jewish identities by engaging them in Jewish life on their own terms. It also empowers students to assume leadership roles, readying them to serve as the next generation of leaders for Jewish communities worldwide. Hillel creates a welcoming and pluralistic framework that encourages every Jewish student to connect to Jewish life in a personally meaningful way. Given that its mission of “maximizing the numbers of Jews doing Jewish with other Jews” is nearly identical to the philanthropic vision of the Foundation, Hillel has become one of the primary vehicles through which the CLSFF is pursuing its campus agenda.

For the Schusterman family, Hillel is much more than a worthwhile program; it is a personal passion. Like her husband before her, Lynn Schusterman currently serves as co-chair of the Hillel International Board of Governors. She also devotes a great deal of time advancing the important mission of this highly respected organization, as do the members of the Foundation staff. In fact, this close working relationship was a major factor in the decision by the CLSFF to open a satellite office in the same building in which Hillel maintains its international headquarters.

Over the years, the association between the CLSFF and Hillel has deepened and

grown to encompass a wide variety of programs, including the flagship **Charles Schusterman Hillel International Student Leaders Assembly**, the **Schusterman Lay Leadership Conference** and the **Schusterman**

Hillel is helping to foster a **RENAISSANCE** of Jewish life around the world. Its vital mission is “maximizing the numbers of **JEWS DOING JEWISH** with other Jews.”

Professional Staff Conference. These important activities, to which the Foundation contributes more than \$1 million annually, provide valuable educational and leadership training opportunities for students, professionals and lay leaders. They also help forge better relationships among Jewish people by bridging denominational differences and nurturing respect for all streams of modern-day Judaism.

The American Israel Education Foundation (AIEF), a group that Charles Schusterman played an instrumental role in establishing, is another key Foundation ally. Working with student activists on more than 200 college campuses across North America, AIEF directs programs and conferences designed to educate students about Israel and to involve them in the American political process.

Through its **Political Leadership Development Program**, AIEF engages college students in pro-Israel political activity. AIEF seeks to increase understanding of Israel’s political and strategic challenges among students. It also encourages them to build relationships with elected officials, serve as interns in the political world, volunteer in campaigns and lobby members of Congress. Since 1989, the Foundation has contributed more than \$100,000 each year to AIEF to help underwrite the cost of its programs.

In 1996, the CLSFF began working with student-run **Lights in Action** (LIA) in an effort to impact those Jewish students



Lynn Schusterman (fourth from left) and a Russian student delegation at the Charles Schusterman Hillel International Student Leaders Assembly.

beyond the reach of Hillel and AIEF. LIA concentrates on increasing Jewish involvement among college students through an array of innovative programs and leadership training retreats. The Foundation has also helped the **Jewish Student Press Service** provide Jewish student journalists with opportunities to develop their skills.

Since 1997, the Foundation has partnered with the **Coalition for the Advancement of Jewish Education** (CAJE) to offer the Schusterman College Program at the annual CAJE conference. In addition to participating in a three-day, pre-conference workshop on careers in Jewish communal service and education, 30 students are trained each year to improve their skills as educators and enhance their commitment to the Jewish community. Students are also offered special career mentorship opportunities.

In support of one of the most ambitious efforts ever targeted toward unaffiliated Jewish students of college age, the CLSFF

recently made a \$5 million, five-year commitment to **birthright israel**. The mission of birthright israel is to strengthen the sense of identity and solidarity among young Jews, encourage return visits to Israel and promote Israel as a resource in Jewish learning. This groundbreaking program seeks to achieve its mission by offering free, ten-day trips to the Jewish state to any young Jewish adult who has never visited Israel on an organized tour.

In its first two years of operation, and despite the challenges it faces as a result of increased tension and conflict in the Middle East, birthright israel is being hailed as a tremendous success. More than 22,000 students have already participated in a birthright trip to Israel and many of them are currently much more involved in Jewish activities on their campus than ever before.

Student conferences are another effective means of strengthening Jewish identity. According to those who have attended



CAJE workshops train college students to become more effective educators and Jewish leaders.

gatherings targeted specifically to Jewish students, a successful conference can be a transformative experience that engenders a closer connection to the Jewish community and ultimately leads to greater participation in Jewish life. The Foundation supports a wide range of student conferences including the **Yale Model Israeli Knesset**, the **Spitzer Forum**, the **United Jewish Communities (UJC) National Student Leadership Conference** and complementary programs offered by Hillel and AIEF.

Student leaders gain
NEW PERSPECTIVES
 on Israeli culture, politics
 and religion, and
ISRAEL'S IMPORTANCE
 to the Jewish people.

Jewish life does not take place in a vacuum, especially on the college campus. Accordingly, the CLSFF also provides annual support to **Project Interchange** for its University Student Body Presidents Seminar in Israel. This program, targeted primarily to non-Jewish college students, seeks to educate leaders of student governments from colleges in states with small Jewish populations about Israel, Judaism and the Jewish community. Through educational programs culminating in a ten-day trip to Israel, these student leaders gain new



The Internet plays an increasingly important role in linking young adults with the larger Jewish community.

perspectives on Israeli culture, politics and religion, and Israel's importance to the Jewish people. Each year, the Foundation funds the Israel trip for the incoming student body presidents of the University of Tulsa, the University of Oklahoma, Oklahoma State University and Oklahoma Baptist University.

The need to engage Jews in Jewish life does not end after the college years. Recognizing that Jews in their 20s and 30s often feel disenfranchised, the CLSFF has been exploring ways to facilitate their involvement in the Jewish community. In March 2001, the Foundation and UJC convened a forum to begin a communal conversation about the traits and needs of this population.

Believing that an Internet-based communication tool could help connect young adults to the Jewish community, the CLSFF and UJC joined with the Boston-based media company, **Jewish Family & Life!**, to begin planning for the development of such a resource.

CURRANTA
8/24/94 DISCUSS PHILOSOPHY
WITH OTHERS.

MAY BE THE GOAL IS FOR ALL
PEOPLE OF THE WORLD TO LIVE
IN HARMONY. IF ^{ALL} HUMAN + CAPITAL
RESOURCES WERE DEDICATED TO
BETTERING HUMANITY, THE
WORLD WOULD BE A FANTASTICALLY
BETTER PLACE.

Around The World

Central to the mission of the Charles and Lynn Schusterman Family Foundation is the notion of *klal Yisrael*, Jewish peoplehood. Talent and wisdom can be found in Jewish communities throughout the world and the Foundation is committed to bringing greater vibrancy and energy to Jewish life wherever it exists. The CLSFF also seeks to facilitate greater interaction among all Jews, believing that enhanced communication will help forge a shared destiny in which Jewish life flourishes.

In an effort to maximize the impact of its global activities, the Foundation has directed the majority of its international giving to programs in Israel and the former Soviet Union (FSU).

The State Of Israel

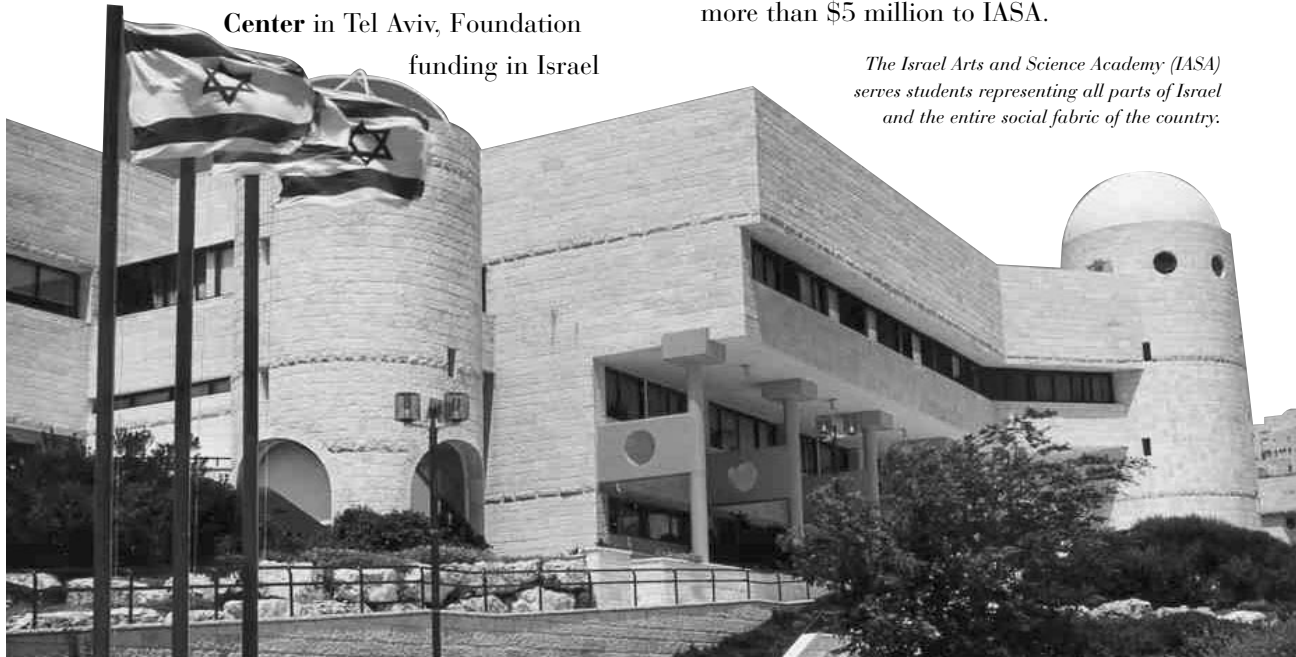
With a few notable exceptions, including a substantial capital and programmatic grant to the renowned **Technion – Israel Institute of Technology** in Haifa and another to the **Glickman Family Violence Prevention Center** in Tel Aviv, Foundation funding in Israel

has been directed towards its capital, Jerusalem. The members of the Schusterman family have a special place in their hearts and souls for this historic city, the center of the Jewish universe. Ever since the Schustersmans purchased an apartment there in 1996, Jerusalem has served as their second home.

Committed to helping Israel educate its future leaders, the Schustersmans agreed in 1989 to help establish a national residential senior high school for exceptionally bright and motivated young people. Today, the **Israel Arts and Science Academy (IASA)** serves students representing all parts of Israel and the entire social fabric of the country: immigrant and *sabra* (native born), religious and secular, Israeli Arab and Jew. Admission to IASA is based on merit. Ninety percent of the students receive scholarship assistance and, in return, maintain high grades and perform community service each week.

IASA also administers an after-school enrichment program in science and math for junior high school students who live in small villages and less affluent communities. Now known as **Mitchell Excellence 2000 (E2K)**, this innovative program reaches 4,500 young Israelis in more than 100 schools throughout Israel. To date, the CLSFF has contributed more than \$5 million to IASA.

The Israel Arts and Science Academy (IASA) serves students representing all parts of Israel and the entire social fabric of the country.



Another Jerusalem-based organization to receive capital funding from the Foundation is *Succat Shalom* (Hebrew words meaning “Shelter of Peace”), a treatment center for the victims of child abuse and their families. The purpose of the center is to foster strong, healthy families and to advocate safe, abuse-free environments for children. The CLSFF has invested more than \$750,000 in *Succat Shalom* over the course of an eight-year relationship, including the funds necessary to build a permanent facility in 1994.

The largest grant the Foundation has made in Israel belongs to the World Union of Progressive Judaism to help cover the cost of its magnificent new headquarters and cultural center. Designed by world renowned architect Moshe Safdie and named *Mercaz Shimshon* (Hebrew words meaning “Samson Center”) in memory of Charles Schusterman’s father, this facility is located on the campus of the Hebrew Union College overlooking the Old City. The building symbolizes the beauty, importance and centrality of liberal Judaism to Jews throughout the world.

In addition to serving as a world center for liberal Jews, *Mercaz Shimshon* will help the Israel Movement for Progressive Judaism expand its educational and cultural offerings for secular Israeli Jews searching for a Jewish tradition they can claim as their own. The



Succat Shalom has received one of the two largest social-service grants ever provided by the CLSFF.

Foundation is proud to have joined with other *bonai Yerushalyim* – partners in the building of Jerusalem – by contributing \$5 million of the \$15 million required to construct and furnish this multifaceted center.

Included among the many other Jerusalem-based organizations that have received one or more programmatic or operating grants from the Foundation are *Kehilat Kol HanesHEMA* (a Progressive synagogue), *Ta Sh'ma* (a pluralistic text-based educational program for English-speaking students), the **Shalom Hartman Institute** (a leader in promoting religious tolerance and respect), the **Israel Museum** and a variety of groups dedicated to advancing the status of women in Israeli society.

The Former Soviet Union

A few years after the collapse of the Soviet empire, Charles and Lynn Schusterman seized upon this unprecedented window of opportunity to help hundreds of thousands of Jews, perhaps even millions, reclaim their Judaism. The Schustermans were determined to help the courageous and resilient Jews of the FSU who, having been stifled, oppressed and forced to assimilate for more than 70 years, were suddenly able to begin rebuilding their synagogues, schools and communities.

Having traveled on several occasions to Russia to meet with *refuseniks* and other Jewish activists during the 1980s, the Schustermans knew that operating effectively in the FSU would be virtually impossible without the help of a strong organizational partner in the region. The group to which the Schustermans turned was the **American Jewish Joint Distribution Committee** (JDC), one of the premier rescue, relief and resettlement organizations in the world.



Scenes from the 2001 Student Leadership Conference held a few miles outside Moscow and named in memory of Charles Schusterman.

Since 1994, the Foundation has been privileged to work with the lay and professional leadership of the JDC to revive Jewish life in the FSU. The relationship between the organizations has now grown to the point where, in addition to partnering with the JDC in the FSU, the Foundation has become increasingly involved in the humanitarian work the JDC performs around the world.

What started as little more than an outreach program... has exploded into a movement that now serves more than 10,000 students each year.

A primary focus of Foundation activity in the FSU, as in North America and Israel, is university-age Jews. For the past seven years, the CLSFF has worked in partnership with the JDC and Hillel to provide social, educational, religious and leadership training for Jewish students in the FSU. Programming includes Shabbat and holiday celebrations, leadership workshops, Jewish cultural activities and opportunities to participate in conferences in the FSU, United States and Israel.

What started as little more than an outreach program in Moscow, St. Petersburg and Kiev has exploded into a movement that

now serves more than 10,000 students each year through a network of 26 Hillel centers spread across seven republics. The annual budget for this program has grown from less than \$300,000 to more than \$1.5 million, approximately one-third of which the CLSFF contributes via the JDC.

This investment has borne fruit in the hundreds of Jewish students who are now enabled and empowered to lead the Jewish renaissance taking place in the FSU. Not only are they living Jewish lives, they are becoming Jewish educators, reminding their grandparents of a forgotten past while teaching Jewish history and customs to their parents and siblings.

Other efforts aimed at developing a strong and indigenous Jewish community in the FSU receive Foundation support as well. In 1997, the CLSFF sponsored a JDC management-training program to prepare men and women to assume leadership positions in their local Jewish communities. Working with the World Union of Progressive Judaism and the Leo Baeck College in London, the Foundation is assisting in the training of Russian-speaking rabbis and para-rabbis to lead congregations throughout the FSU. The CLSFF is also helping the JDC explore the possibility of building new Jewish community centers in Moscow, St. Petersburg and Kiev.

CHARITY

8/4/43 I would like to help
good young people to be
even better. Also help
them with leadership and
encourage them to provide
community service.

Throughout Oklahoma

A favorite adage of the Schustermans, indeed of the Jewish tradition itself, is that “charity begins at home.”

Accordingly, the CLSFF is a notable long-term financial supporter of local Jewish organizations and activities in Oklahoma. This dedication to the city and state in which Charles achieved his prosperity has also led the Schustermans, as well as all of the Tulsa-based members of the Foundation staff, to accept leadership roles in their local communities.

Most Foundation activities in Oklahoma are directed toward broadening the scope of learning opportunities, improving communities, advancing Jewish life and providing assistance to the economically disadvantaged. The CLSFF supports organizations and ideas with the potential to impact large numbers of people and has a special interest in projects that help people help themselves. The CLSFF vision is one that emphasizes self-improvement, opportunities and accountability.

A Focus On Education

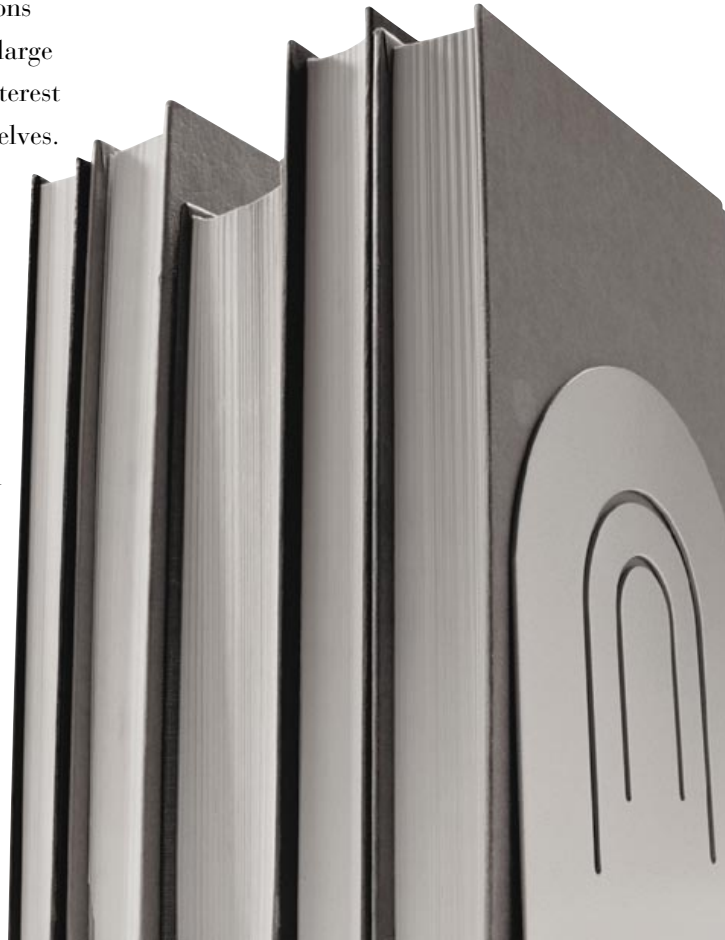
The Schusterman Center at the University of Oklahoma-Tulsa represents the largest education-related commitment ever made by the CLSFF. In 1999, the Foundation contributed \$10 million to OU to help the university secure a new campus in Tulsa. This grant presented Charles Schusterman with a perfect oppor-



tunity to simultaneously satisfy dual loyalties to his Norman-based alma mater and his hometown of Tulsa.

The new facility will house expanded educational and research programs. It will also give OU-Tulsa the capacity to increase enrollment in its graduate programs and appreciably improve the quality of medical services in Northeast Oklahoma in the coming years.

OU has been the beneficiary of the only endowment gift ever made by the Foundation. The **Schusterman-Josey Chair in Judaic History**, named in tribute to the deceased



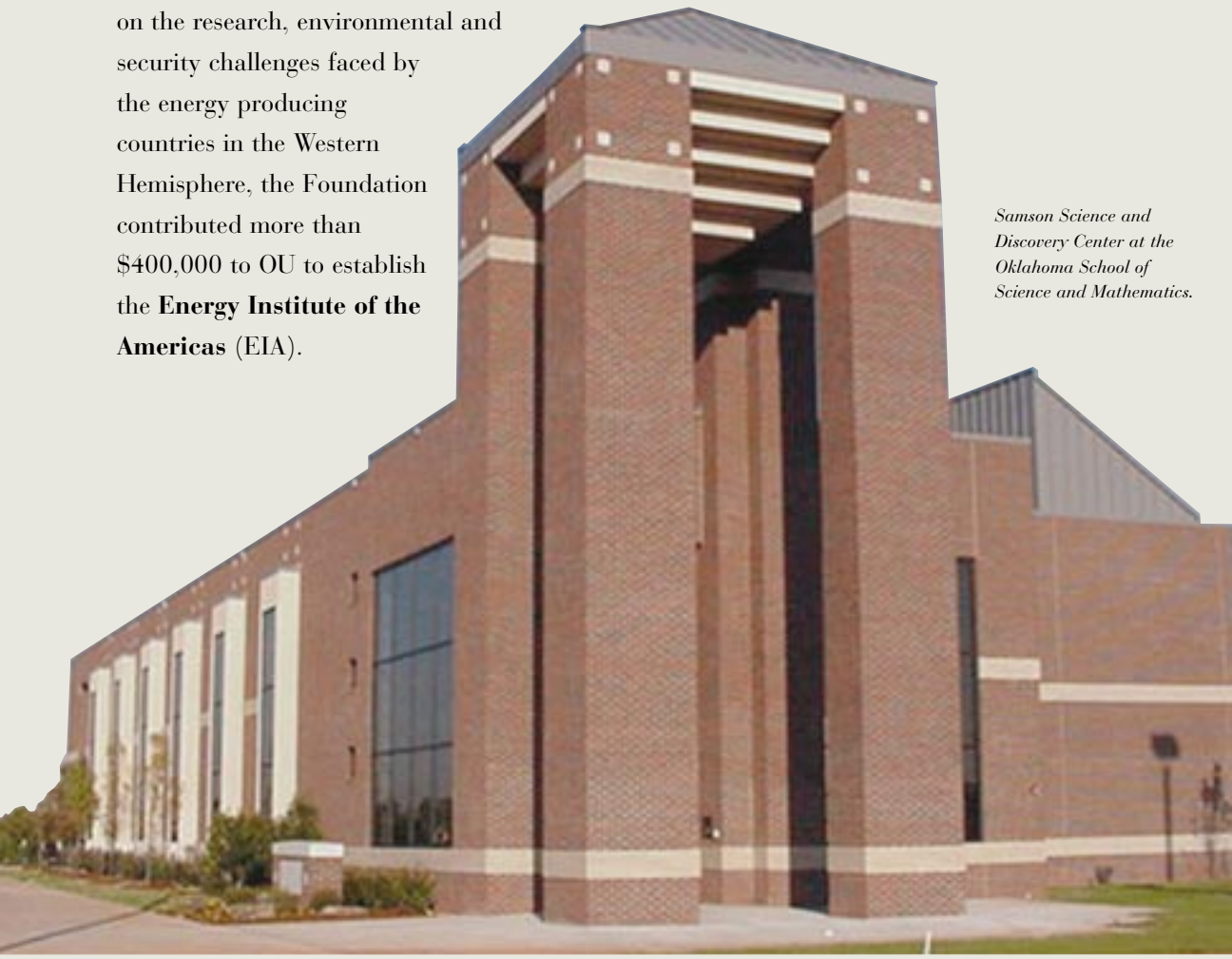
fathers of Charles and Lynn, reflects how the Foundation works with grantees to leverage funds and optimize results. After learning in 1993 that OU needed an endowment of \$1.5 million to establish this chair, the Foundation contributed \$750,000 to the project, contingent upon the university securing a dollar-for-dollar matching grant from the Oklahoma legislature. Availing itself of a special state program designed to improve higher education in Oklahoma, OU successfully matched the Foundation grant and recruited a world-renowned Judaic scholar, Norman Stillman, to fill the chair. Under the wise stewardship of Dr. Stillman and his late wife, Dr. Yedida Stillman, what began as a single course in Jewish history has grown into a nationally acclaimed Judaic studies program involving three full-time faculty positions and seven adjunct professors.

Responding to the need to focus on the research, environmental and security challenges faced by the energy producing countries in the Western Hemisphere, the Foundation contributed more than \$400,000 to OU to establish the **Energy Institute of the Americas** (EIA).

Seven universities throughout North and South America are members of EIA, including OU and the University of Tulsa.

In addition to supporting higher education in Oklahoma, the CLSFF is engaged in several efforts to improve secondary education throughout the state. Working again in partnership with the State legislature, the Foundation was able to help the **Oklahoma School of Science and Mathematics** (OSSM), a premier public high school for gifted students, anchor the north side of its 32-acre campus in Oklahoma City with a new, state-of-the-art teaching facility. The 24,763-square-foot **Samson Science and Discovery Center**, to which the Foundation and the State of Oklahoma each contributed \$1,000,000, houses seven teaching and eight research laboratories, a computer lab, a large teaching arena and technology for

Samson Science and Discovery Center at the Oklahoma School of Science and Mathematics.





distance education and videoconferencing. The Foundation also joined with OSSM to initiate the **Discovery Program** in Oklahoma. This after-school enrichment program is modeled on a similar project for Israeli students administered successfully by the Israel Arts and Science Academy.

At the urging of the CLSFF, the **Oklahoma Foundation for Excellence** (OFE) recently expanded its activities beyond providing annual recognition and scholarships to the 100 top “Academic All-State” high school students. The OFE now arranges for Academic All-State alumni to serve as mentors for underachieving students in elementary school. Like the OFE, the Foundation believes that outstanding students who receive scholarships and other awards should be encouraged to contribute to the educational community from which they came.

Innovative Education Programs

The CLSFF has consistently aligned itself with creative programs that teach the value

of cultural diversity through experiential learning. In 1996, the Foundation became a major sponsor of **Kids’ World**, an enrichment program held in alternate years that exposes elementary school children to a diversity of cultures, countries and religions.

As a result of the overwhelming success of this program, the CLSFF has steadily increased its funding for Kids’ World and recently awarded \$45,000 to the **Tulsa Global Alliance** to help fund the program. The Foundation is also a major sponsor of **Camp Anytown**, a weeklong residential program conducted by the National Conference for Community and Justice, which promotes tolerance among secondary school students.

Introducing children to the arts is yet another aspect of the CLSFF educational agenda in Oklahoma. The Foundation appreciates the importance of exposing young people, particularly those from low-income families, to the beauty and majesty of both the fine arts and the performing arts. The CLSFF has long supported a wide range of programs through which cultural institutions in Tulsa have shared their passion and talent with young people. Among the cultural activities the CLSFF has funded are the *Schusterman Young-at-Art* series of theatrical performances by the **Tulsa Performing Arts Center**, special productions for children by the **Tulsa Opera** and the **Tulsa Philharmonic**, a program featuring costumed scholars portraying historical figures presented by the **Arts and Humanities Council of Tulsa** and two educational offerings through which the highly-regarded **Philbrook Museum of Art** shared its outstanding collection of paintings, drawings and antiquities.

Alternative Learning Schools

The CLSFF supports three institutions in Tulsa that endeavor to reach students who have not succeeded in conventional instructional venues. **Street School** is a private secondary school that helps students

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MAJESTY of both the fine
arts and the performing arts.

graduate even after they have fallen behind in accumulating credits or dropped out of high school entirely. **Project 12** is a public institution serving the same population. Both schools integrate traditional course instruction with on-site counseling, life skills and family training.

Town and Country School is an independent day school established in 1967 to serve students with special educational needs. The CLSFF has committed \$50,000 in matching grants to Town and Country School since 1999 for general operational expenses. Currently the only school of its type in the state of Oklahoma, Town and Country serves 120 students from kindergarten through 12th grade.

Community Support

Along with providing extensive support to educational organizations in Oklahoma, the Foundation sponsors initiatives to improve the state's community services, especially as these relate to the economically disadvantaged and the victims of child abuse.

In 1999, Charles and Lynn Schusterman joined with other prominent Tulsans to establish the **Tulsa Community Foundation** (TCF). Each founding partner of the TCF serves on its board and has agreed to give at least \$5 million to or through the organization to help it reach its goal of raising \$100 million within its first ten years of existence.



Introducing children to the arts is an important part of the CLSFF agenda in Oklahoma.



The foundation has consistently supported innovative Tulsa-area programs that benefit students with special educational and financial needs.

Like community foundations in other cities, the TCF provides philanthropic leadership for important local initiatives and helps individual donors fulfill their own philanthropic missions.

The Schusterman family also provides more than \$60,000 per year in support to the **Tulsa Area United Way**, in part as a means of encouraging their employees at the CLSFF and Samson Investment Company to contribute to the annual campaign.

In 1993, the CLSFF helped found the **Partnership for the Availability of School Supplies (PASS)**, a social service program that annually provides 8,000 children from low-income families with the school supplies they need for the academic year. The Foundation has worked side by side with the **Community Action Project of Tulsa County (CAP)** to grow PASS, matching one dollar for every two dollars raised from the

community. Gifts totaling \$225,000 have been given by CLSFF for this initiative.

The Foundation has also been a major supporter of the CAP-directed **Earned Income Tax Credit** program in Tulsa. This project helps community volunteers file federal tax returns on behalf of low-income taxpayers. As a result of this initiative, millions of dollars have been returned to Tulsa's low-income residents who, in turn, boost the local economy by spending the money in their community. This program was recognized as a national Honorary Mention Recipient by the Mutual of America Foundation in 2000 and is being replicated in cities across the nation.

In 1997, the CLSFF donated \$500,000 to help construct a new home for the **Parent-Child Center of Tulsa**, an organization dedicated to the prevention and treatment of child abuse and neglect. More recently, the

Foundation committed \$600,000 to help **Family & Childrens' Services, Inc.** enlarge its headquarters and expand its activities.

Two other family-related organizations the CLSFF has supported are **Planned Parenthood of Eastern Oklahoma and Western Arkansas** and the **Child Abuse Network (CAN)**. The Foundation has contributed more than \$225,000 to help Planned Parenthood build a much-needed clinic on the west side of Tulsa, consolidate its regional activities and enhance its educational initiatives. Financial assistance to CAN has helped to fund its innovative, multi-disciplinary approach to the prevention and treatment of child abuse. The Foundation is currently exploring the possibility of developing a CAN-like agency in Israel.

As Tulsa grows, so does its need for quality programs and the facilities in which they are housed. In addition to the organizations and programs highlighted above, the CLSFF has provided substantial capital funding to **Goodwill Industries of Tulsa, Domestic Violence and Intervention Services, Inc.**, and **Youth Services of Tulsa**.

The Foundation derived particular pleasure in funding the creation of a new library in Tulsa in 1997. The CLSFF made a grant of \$370,000 to the **Tulsa Library Trust** to allow for the construction of a new facility known as the **Schusterman-Benson**



Library. This new branch replaced the library to which the Schustersmans took their own children, one that could not expand to accommodate the increasing population of its surrounding neighborhoods. In addition to providing regular library services, the CLSFF-supported branch houses one of the most comprehensive collections of genealogical materials in the region.

Jewish Giving

Known for many years to be one of the strongest and most vibrant small Jewish communities in America, Tulsa owes its enviable reputation to the ability of the **Jewish Federation of Tulsa (JFT)** to meet the needs of local Jewry while simultaneously providing leadership and funds to national and international Jewish organizations. The JFT, an affiliated agency of the United Jewish Communities, is also the organization with which the CLSFF works most closely to promote Jewish life in Tulsa.



The CLSFF has contributed more than \$5 million to the JFT over the years, more than \$1.5 million of which has been used to support local programs. In addition, the Foundation has a policy of providing subsidies to Jewish families from Tulsa who wish to have their children participate in a Jewish program but cannot afford the full cost. Whether the program is initiated by the CLSFF, the JFT or another local Jewish institution is unimportant. The Foundation supports the efforts of every local Jewish institution to promote Jewish renewal in Tulsa.



For the past 26 years, Heritage Academy has served as the Jewish community day school in Tulsa.

Since 1988, the CLSFF has also provided more than \$200,000 in funding to **Heritage Academy** to help ensure that Jewish children in Tulsa can afford a Jewish day school education. Serving an average of 50 students each year, Heritage Academy

blends a high-quality secular education with a distinctive focus on Judaic studies and culture. Students are educated in a nurturing environment that works towards fulfilling the school's vision of instilling children with the spiritual compass of Torah and a lifelong love of learning.

Jewish camping, an experience that has proven to have a profound effect on shaping the positive Jewish identities of those who participate, is another area in which the Foundation lends assistance. The cost of sending a child to a residential summer camp is simply beyond the means of many Jewish families. To address this situation, the CLSFF has joined with two local synagogues, **Congregation B'nai Emunah** and **Temple Israel**, as well as the JFT, to provide the financial support needed by Jewish children from Tulsa who wish to attend summer camp. The Foundation has also contributed \$400,000 to **Ramah Darom: The Center for Southern Jewry**, home to the residential summer camp attended by many Conservative Jewish children from Tulsa.

Other Oklahoma-based Jewish groups receiving support from the CLSFF include the **Hillel Foundation at the University of Oklahoma**, the **Jewish Federation of Greater Oklahoma City**, the **Tulsa Jewish Retirement and Health Care Center**, the **Sherwin Miller Museum of Jewish Art**, the Tulsa chapter of **BBYO** and **OKIE**, a cultural and business exchange program between the States of Israel and Oklahoma.

CHARITY 9/27/92

GIVE TO MAKE A BETTER WORLD
SHARE YOUR WEALTH.

I LIKE EFFICIENT, COST EFFECTIVE DELIVERY
OF CHARITABLE SERVICES

TRY TO DO SOMETHING THAT HAS NOT BEEN
DONE BEFORE - BUT THAT TAKES TIME -
IF YOU WANT IT DONE WELL.

10/12/92 SHOULD I TRY TO BE MORE
SUPPORTIVE OF MORE PROGRAMS?

10/15/92 GIVE BACK TO YOUR COMMUNITY. BE
PURELY KIND.

GIVING SUMMARY



	1987-2001		2001		2000	
JEWISH/NON-JEWISH (OVERALL)						
Jewish	\$34,843,358	73.42%	\$8,090,781	66.67%	\$4,273,071	57.93%
Non-Jewish	\$12,617,262	26.58%	\$4,044,298	33.33%	\$3,102,633	42.07%
Totals	\$47,460,620	100.00%	\$12,135,079	100.00%	\$7,375,704	100.00%
GEOGRAPHIC LOCATION						
National	\$16,384,390	34.52%	\$5,014,168	41.31%	\$1,880,275	25.49%
Israel	\$11,359,290	23.93%	\$982,551	8.10%	\$1,811,993	24.57%
FSU	\$4,403,780	9.28%	\$1,773,800	14.62%	\$136,500	1.85%
Subtotal	\$32,147,460	67.73%	\$7,770,519	64.03%	\$3,828,768	51.91%
Tulsa	\$11,602,294	24.45%	\$3,607,361	29.73%	\$2,813,852	38.15%
Oklahoma	\$2,742,663	5.78%	\$669,635	5.52%	\$607,576	8.24%
Other	\$968,203	2.04%	\$87,564	0.72%	\$125,508	1.70%
Subtotal	\$15,313,160	32.27%	\$4,364,560	35.97%	\$3,546,936	48.09%
Totals	\$47,460,620	100.00%	\$12,135,079	100.00%	\$7,375,704	100.00%
CATEGORY (OVERALL)						
Education	\$14,557,577	30.67%	\$3,479,311	28.67%	\$3,279,074	44.46%
Religion	\$13,674,060	28.81%	\$4,167,499	34.34%	\$2,385,211	32.34%
Campus	\$12,449,154	26.23%	\$3,066,860	25.27%	\$1,165,692	15.80%
Social Services	\$5,055,278	10.65%	\$1,260,715	10.39%	\$406,033	5.51%
Other	\$1,724,551	3.64%	\$160,694	1.33%	\$139,694	1.89%
Totals	\$47,460,620	100.00%	\$12,135,079	100.00%	\$7,375,704	100.00%

These figures represent all contributions made by Charles and Lynn Schusterman during the period from 1987-2001, including those made through their Foundation.

1999		1998		1997		1996	
\$5,189,228	88.30%	\$3,617,040	83.27%	\$3,541,135	68.69%	\$1,839,049	77.20%
\$687,642	11.70%	\$726,608	16.73%	\$1,613,900	31.31%	\$543,155	22.80%
\$5,876,870	100.00%	\$4,343,648	100.00%	\$5,155,035	100.00%	\$2,382,204	100.00%
\$1,824,059	31.03%	\$1,680,259	38.68%	\$1,683,305	32.65%	\$935,070	39.24%
\$2,432,033	41.38%	\$1,153,957	26.57%	\$659,528	12.79%	\$459,177	19.28%
\$473,391	8.06%	\$461,856	10.63%	\$611,144	11.86%	\$279,316	11.73%
\$4,729,483	80.47%	\$3,296,072	75.88%	\$2,953,977	57.30%	\$1,673,563	70.25%
\$689,235	11.73%	\$766,544	17.65%	\$1,893,822	36.74%	\$460,363	19.33%
\$155,633	2.65%	\$143,342	3.30%	\$167,700	3.25%	\$182,982	7.68%
\$302,519	5.15%	\$137,690	3.17%	\$139,536	2.71%	\$65,296	2.74%
\$1,147,387	19.53%	\$1,047,576	24.12%	\$2,201,058	42.70%	\$708,641	29.75%
\$5,876,870	100.00%	\$4,343,648	100.00%	\$5,155,035	100.00%	\$2,382,204	100.00%
\$771,559	13.13%	\$800,036	18.42%	\$838,538	16.27%	\$579,285	24.32%
\$2,704,728	46.02%	\$1,412,975	32.53%	\$1,081,921	20.99%	\$208,047	8.73%
\$1,570,372	26.72%	\$1,483,973	34.16%	\$1,789,726	34.72%	\$1,103,894	46.34%
\$308,769	5.25%	\$163,953	3.77%	\$930,357	18.05%	\$326,874	13.72%
\$521,442	8.88%	\$482,711	11.12%	\$514,493	9.97%	\$164,104	6.89%
\$5,876,870	100.00%	\$4,343,648	100.00%	\$5,155,035	100.00%	\$2,382,204	100.00%

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Charles and Lynn
SCHUSTERMAN
FAMILY FOUNDATION

Tulsa, Oklahoma