

John & Claudia Holliman Affiliated Fund

Executive Director / CEO

EIN 731528946
 OK · NTEE T11
 FY ending 2023-06-30
 June 9, 2026

This analysis benchmarks the total compensation of **Helen Stone, Executive Director / CEO** (\$25,864) against **every comparable organization** that fit the selection criteria — **24** in total — drawn systematically from IRS Form 990 filings, not a hand-picked subset.

Compensation sits at approximately the **71st** percentile of comparable organizations

within the typical range

Benchmarked executive: Helen Stone — reported title "SECRETARY", selected as the organization's **highest-paid individual** — no exact title match, so confirm this is a comparable role.

How comparable organizations were selected

SECTOR Organizations sharing the subject's NTEE classification (T11).

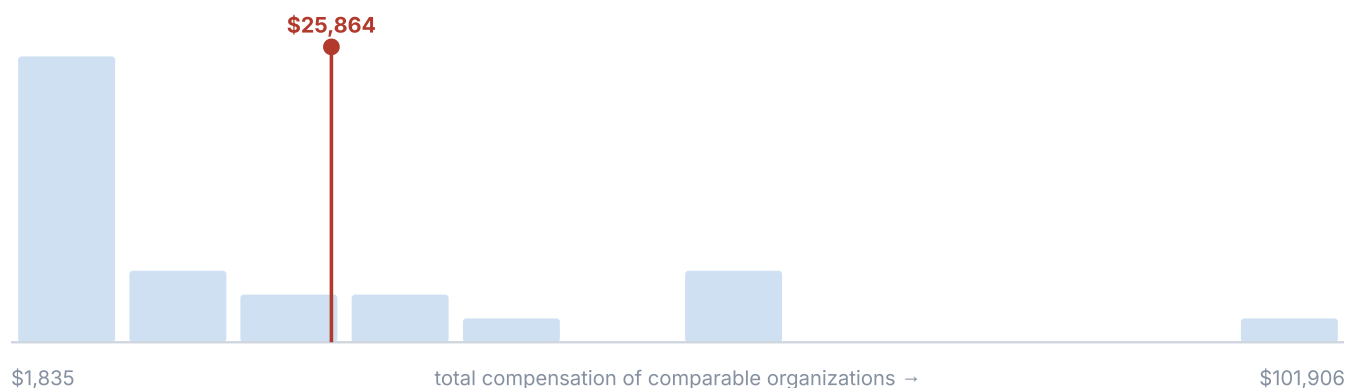
BUDGET Total revenue between \$46,514 and \$104,136 — 0.67x to 1.50x the subject's \$69,424 (the band tightens as size grows).

GEOGRAPHY Same NTEE sector (T11), nationwide + budget 0.67–1.5x revenue.

24 organizations qualified on sector, size, and geography

→ **24** within the band form the benchmarked peer set.

Distribution of comparable compensation



\$7,416

\$8,426

\$11,744

\$31,034

\$56,286

\$25,864



● Comparable organizations

Each figure is Form 990 Part VII columns D + F (reportable pay plus other compensation and benefits; column F may include amounts from related organizations), normalized to OK cost of living (BEA RPP, 2023) and to its filing year (CPI-U); the reported amount is on each linked 990.

ORGANIZATION	STATE	REVENUE	MATCHED TITLE	COMP (REPORTED)	COMP (ADJUSTED)	FY
Minnesota Foundation For Fiscal	MN	\$74,212	Executive Director	\$3,766	\$3,283	2024
Rancho Santa Fe Foundation	CA	\$74,250	President & Ceo	\$21,459	\$16,345	2024
Cynchealth Foundation Inc	NE	\$74,951	Director & Ceo	\$14,250	\$13,519	2024
Faholo Foundation Inc	MD	\$78,240	Director	\$29,328	\$24,187	2024
Nathalie & Theodore Jones Charitable	MA	\$59,543	Trustee	\$9,991	\$8,153	2023
Lyn Stacie Getz Foundation Inc	MD	\$59,459	President & Public Director	\$12,125	\$9,999	2024
Wisconsin Builders Foundation Inc	WI	\$79,695	Executive Director	\$33,352	\$30,725	2024
Nathalie & Theodore Jones Charitable	MA	\$58,341	Trustee	\$11,015	\$8,731	2024
Nathalie & Theodore Jones Charitable	MA	\$58,126	Trustee	\$11,037	\$8,748	2024
The Tyner Family Foundation	OH	\$83,525	Treasurer	\$60,259	\$57,962	2023
Nathalie & Theodore Jones Charitable	MA	\$55,065	Trustee	\$10,969	\$8,695	2024
Nathalie & Theodore Jones Charitable	MA	\$52,285	Trustee	\$10,643	\$8,437	2024
Chouteau House Qalibc Inc	MO	\$89,148	Vp Of Finance	\$34,211	\$31,962	2024
Nathalie & Theodore Jones Charitable	MA	\$49,309	Trustee	\$9,499	\$7,529	2024

ORGANIZATION	STATE	REVENUE	MATCHED TITLE	COMP (REPORTED)	COMP (ADJUSTED)	FY
Nathalie & Theodore Jones Charitable	MA	\$46,636	Trustee	\$9,296	\$7,368	2024
The Harry W & Margaret Moore	OH	\$95,873	Trustee	\$2,016	\$1,835	2025
The Society Of American Archivists	IL	\$96,363	Executive Director	\$24,361	\$21,750	2023
United Way Of South Hampton Roads	VA	\$97,280	Chief Executive Officer	\$15,837	\$13,489	2024
Kidd Family Foundation	OH	\$98,100	Asst Secretary/trustee	\$105,945	\$101,906	2023
Community Partners Inc	AZ	\$98,962	President & Ceo	\$10,460	\$8,874	2024
Vernon Julianne Declaration Of Trust	FL	\$100,226	Trustee	\$67,471	\$55,911	2024
Djr Foundation	LA	\$100,660	Director	\$58,114	\$56,447	2024
Memorial Community Hospital Foundation	NE	\$102,001	Board Member	\$8,846	\$8,392	2024
Goodwill Of North Georgia Development	GA	\$102,500	President	\$41,950	\$38,306	2023

Comp (reported) is the figure on each organization's Form 990 (columns D + F); **Comp (adjusted)** normalizes it to OK cost of living and 2023 dollars. Click any organization to verify the figure on ProPublica.

■ Methodology

Comparable organizations were drawn from electronically filed IRS Form 990 returns and matched on sector (NTEE code), budget (a size-adaptive revenue band that tightens as the organization grows), and geography (same-state first, broadening only when too few peers qualify); every organization within the band forms the peer set. To compare fairly across regions and years, peer compensation is normalized to OK cost of living (BEA Regional Price Parities, 2023) and to the subject's filing year (CPI-U). The figure benchmarked is Form 990 Part VII, Section A, columns D + F — reportable pay plus other compensation, benefits, and deferred amounts (column F may include amounts from related organizations) — with the chief executive matched by role. Related-organization amounts (column E) and institutional trustees are excluded. Full methodology: peerbasis.org/methodology.

■ Sample, role match & sensitivity

PEER COUNT **24** organizations. Compensation range \$1,835–\$101,906; filing years 2023–2025.

SIZE BASIS	Matched on total revenue (\$69,424); for reference, expenses \$113,700 and assets \$1,215,950. Revenue and expenses diverge this year — revenue may misrepresent operating size; weigh the expense-based view.
ROLE MATCH	Helen Stone, reported title " <i>SECRETARY</i> ", benchmarked as Executive Director / CEO. Selected as the organization's highest-paid individual without an exact title match — the board should confirm this is a comparable role.
RELATED-ORG PAY	17 peers report related-organization compensation (column E), which the D + F benchmark does not fully capture; review where material.
OUTLIERS	1 peer fall outside 1.5× the interquartile range — consider whether any reflect one-time payments (severance, deferred-comp payouts).

Sensitivity — the subject's percentile under alternative compensation definitions:

BASIS	SUBJECT PERCENTILE
Total compensation (D + F), cost-of-living + inflation adjusted — the PeerBasis default	71 st
Total compensation (D + F), as reported (no adjustments)	67 th
Reportable pay only (column D), adjusted	0 th
All sources (D + E + F), adjusted	46 th

If the percentile moves materially across these definitions, the result is sensitive to methodology choices, and the board should weigh which basis best fits its facts.

● Rebuttable presumption of reasonableness · 26 CFR 53.4958-6

Compensation paid by a tax-exempt organization is presumed reasonable — shifting the burden to the IRS — when three requirements are met. This report supplies the comparability data for the second. The board should record the following in its minutes *concurrently* with its decision:

Draft board minutes – executive compensation

1. The compensation of the Executive Director / CEO (Helen Stone) was approved in advance by [the Board / Compensation Committee], composed of members with no conflict of interest with respect to the arrangement.
2. Prior to its determination, the authorized body obtained and relied upon appropriate comparability data, namely the PeerBasis Compensation Comparability Determination dated June 9, 2026, comparing compensation against 24 similarly situated organizations (Same NTEE sector (T11), nationwide + budget 0.67–1.5× revenue).

3. The authorized body determined that total compensation of \$25,864 is reasonable (approximately the 71st percentile of comparable organizations) and documented the basis for this determination concurrently, on [date] , by a vote of [__ for / __ against] .

Sources: IRS Form 990 e-file data (apps.irs.gov); IRS Business Master File (NTEE classification). Every figure traces to an original public filing — click any organization above to verify it on ProPublica. PeerBasis is a service of Prismind Analytics; its [methodology is published](#), was commissioned for independent adversarial review, and discloses its own limitations. This report is comparability data to support a board's good-faith determination under IRC 4958; it is not legal or tax advice. Generated by PeerBasis on June 9, 2026.