

# Simplified Charitable Giving



## ETCF Appoints Glenney as Board Chair, Five New Board Members

East Texas Communities Foundation announces the appointment of Shannon Glenney to serve as Chairperson for 2023 and welcomes Shannon Dacus, Toby Fails, Bill Newburn, Steve Spitzer and Kim Wright to serve as new board members.

"We are very excited to add these community leaders to our board," said Kyle Penney, President of East Texas Communities Foundation. "Each board member of ETCF possess a variety of expertise and a shared understanding of how local giving can impact the needs of our community."



Shannon Glenney steps into the role as board chair after serving on the ETCF board since 2015.

Shannon has taken and active role in volunteerism in Tyler serving on numerous boards including the Women's Fund of Smith

County, Women's Symphony League and Pine Cove.

Shannon Dacus is President and partner at the Dacus Firm and is engaged in the development and improvement of the local community through service on local boards. Shannon returns to the ETCF board after serving as a past board chair in 2014.



Toby Fails is the Senior Vice President, Wealth Management Director for VeraBank. Toby received an undergraduate degree from Lamar University and a MBA in Financial Management from the University of Dallas.



Bill Newburn is a Wealth Management Advisor for Regions Bank and serves as

the company's market executive for Tyler and Longview. He is a past president of the East Texas Estate Planning Council and the Heart of Tyler.



Steve Spitzer is managing shareholder at Ramey & Flock Law Firm. Steve is a graduate of Baylor School of Law and currently practices in wills, probate and estate planning.



Kim Wright works for Buckner Children and Family Services as a Major Gifts Officer. Kim is very involved in the nonprofit community in Gregg County.

### 2023 Executive Committee:

**Board Chair** – Shannon Glenney, Community Volunteer

**Vice Chair / Governance Chair** – Barbara Bass, Benefits / Fundraiser Auctioneer

**Treasurer** – John Jones, CEO, Jones Legacy Ventures

**Marketing & Development Chair** – Mark Hagan, Sr. Vice President- Wealth Management, CFP/CAP KNH Wealth Management Group UBS Financial Services

**Audit Chair** – Richard Perryman, Retired Investment Advisor

**Grants Chair** – Anthony Brooks, CEO, Azalea Orthopedic & Sports Medicine

**Investment Chair** – Scott Terry, Retired Investment Advisor

**Policy Chair** – Craig Adams, Attorney, Adams & Coker, P.C.

**Immediate Past Chair** – Tiffany Kirgan, Financial Advisor, CFP / CAP / CLU, Johnson Financial Group

## ETCF Ends 2022 Granting \$12.3 Million

East Texas Communities Foundation awarded more than \$12.3 million in grants to over 800 different nonprofit organizations in 2022.

"ETCF is honored to connect generosity with need," said Kyle Penney, President of East Texas Communities Foundation. "Thanks to the support of our donors and the work of dedicated and talented nonprofits, we are able to fund solutions that address community needs."

Most of the grants benefited nonprofits in ETCF's 32 county service area that includes: Anderson, Angelina, Bowie, Camp, Cass, Cherokee, Delta, Franklin, Freestone, Gregg, Harrison, Henderson, Hopkins, Houston, Lamar, Leon, Marion, Morris, Nacogdoches, Panola, Rains, Red River, Rusk, Sabine, San Augustine, Shelby, Smith, Titus, Trinity, Upshur, Van Zandt and Wood counties.

The top categories were Education (31%), Health (20%), and Religion (17%).

"ETCF is proud to see the community continue to prioritize charitable giving," said Penney. "We know with today's market ups and downs that nonprofits are trying to stretch each dollar gifted to them. We look forward to providing grants in 2023 while working closely with donors to reach their charitable goals."

In addition to the generous grantmaking seen in 2022, ETCF fundholders contributed more than \$12 million for future charitable giving. ETCF ended the year with \$115 million in charitable assets under management.

ETCF enters 2023 stewarding more than 430 unique charitable funds, established by individuals, families, corporations and nonprofit organizations.

# Plunkett Foundation Awards Grants to Nonprofits Serving East Texas

Fifteen nonprofits serving Gregg, Nacogdoches, Rusk, and Smith counties were awarded grants totaling \$110,000 from the T.J. and LaVerne Plunkett Foundation held at East Texas Communities Foundation in Tyler, Texas.

Gregg County nonprofit, Family Promise of Longview, received funding to provide rent and utility assistance to families.

“This grant will be put to use immediately,” said Doris Ramaly, Executive Director of Family Promise of Longview. “Thanks to this grant, we will provide up to \$1,000 per family to those that are at risk or on the verge of homelessness. In addition to funds, we will provide clients’ money management training, life skills and educate them on the *Keys to Good Tenancy*.”

Families receiving financial support will have the funds paid directly to the property owners or utility companies.

“We have seen a 37% increase in just the past nine months from families needing this safety net,” said Ramaly. “The rising cost of gas, food and rent on low-income families is staggering. Many are just one crisis away from being on the streets. Since we can only provide financial assistance once to a family, it is really important to get them back on track, managing the resources they have so they don’t end up homeless.”

Founded in 2004, Family Promise of Longview works to break the cycle of poverty by helping families with children experiencing homelessness achieve long-term financial independence.

T.J. and LaVerne Plunkett Foundation grant recipients for 2022 are:

**Rusk County**

- Boys and Girls Club of Rusk County: Power Hour Educational Enhancement Program

- Christian Women’s Job Corps of Rusk County: general operating support

- Henderson Food Pantry: general operating support

- Sonshine Lighthouse Ministries: support for the Son Shine Grounds mobile coffee truck and general operating support

**Gregg County**

- Family Promise of Longview: rent & utility assistance for families

- Rahab’s Retreat & Ranch: general operating support

- Salvation Army of Longview: Commodities Closet and Food Pantry

- Texas Shakespeare Festival Foundation: general operating support for 2023 season

**Nacogdoches County**

- Boys & Girls Club of Deep East Texas: The Torch Club

- Christian Women’s Job Corps of Nacogdoches County: general operating support

**Smith County**

- Champions for Children: teacher training program for Rusk County

- East Texas Food Bank: general operating support

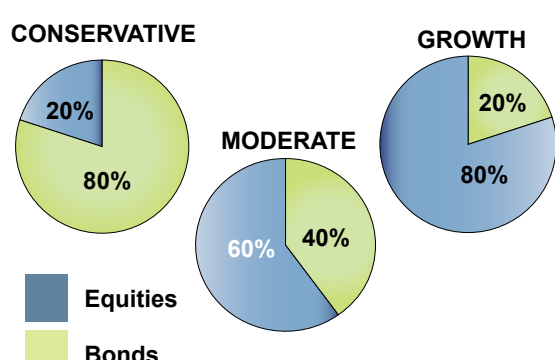
- East Texas Wellness: general operating support for Smith County Juvenile Center’s HOPE Academy

- For the Silent: general operating support

- King’s Storehouse Food Bank: food purchase



**ETCF hosted a reception for nonprofits that were awarded grants from the Plunkett Foundation. Pictured left to right are Doris Ramaly, Executive Director of Family Promise of Longview and Kyle Penney.**



**INVESTMENT RETURNS- As of December 31, 2022**

PORTFOLIO	Year-To-Date	3 Year	5 Years	Since Inception
Conservative	-14.31%	-1.92%	0.84%	3.72% (02/03)
Conservative-ETF	-13.34%	NA	NA	-2.41% (06/20)
Moderate	-16.72%	0.25%	2.68%	5.04% (02/03)
Moderate-ETF	-15.73%	2.16%	3.84%	6.23% (09/11)
Growth	-17.41%	2.52%	4.03%	6.35% (02/03)
Growth-ETF	-16.68%	3.75%	5.20%	8.01% (03/16)

Additional information available at [www.etcf.org](http://www.etcf.org). Returns shown are net of fees paid to money managers.

## Carroll Scholarship Enters 22nd Year of Recognizing Grand Saline Graduates

Established in 2002 with gifts from the family and friends of Adam Carroll, the scholarship honors the memory of a young man known for his love of people, sports and his zest for life. Since it's creation, the Adam Carroll Memorial Scholarship has been awarded to twenty-one Grand Saline High School seniors.

"This scholarship helped me so much with tuition and books," said Landon Lovette, the very first recipient of the Adam Carroll Scholarship. "It is truly an honor to be included in the list of recipients. It was really special for me, since I knew first hand of how kind and funny Adam was." Lovette graduated from Texas Tech University with a degree in Exercise Sports Science and minor in Biology.

If you would like to discuss creating a scholarship at ETCF, please call 903-533-0208 to set up an appointment.



**Landon Lovette and family.**

# GRANTS

## MAKING AN IMPACT +

Take a look at what is happening around East Texas. The pictures below represent just a few of the ways fundholders are investing in our communities through ETCF.



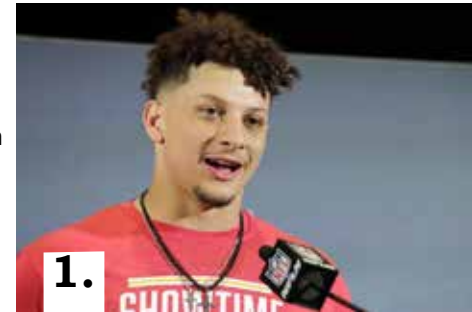
**2.**

**Human Services:** The Volunteer Council for Rusk State Hospital is a resource for donations of goods, services, merchandise for the use and benefit of the hospital and it's patients. In February, the First United Methodist Church of Longview women hosted a February birthday party for residents.



**3.**

**Veterans:** CampV now offers a fitness center available for Veterans and their families. CampV works to integrate military and civilian resources through one central location providing efficient and effective support and fellowship for Veterans, active duty, reserves, guards and their families.



**1.**

**4.**



**Community Development:** The Texas African American Museum was founded in 2017 as a branch of the Empowerment Community Development Corporation to preserve African American history. In February, the group hosted their second annual Black History Month Gala. Pictured left to right are Gloria Mays Washington, Greg Muckleroy and Sarah Cummings.



**5.**

**Human Services:** A grant to Breckenridge Village of Tyler provided equine therapy to residents. Breckenridge Village of Tyler is a caring residential community for adults with mild to moderate intellectual disabilities.



East Texas Communities Foundation  
315 N. Broadway, Suite 210  
Tyler, Texas 75702  
www.etcf.org

In February, East Texas Communities Foundation President, Kyle Penney, participated in Foundations on the Hill with fellow members of Philanthropy Southwest. The goal of the event is to educate Congress about the unique and vital role charitable giving plays in America.

Pictured left to right: Tony Fundaro, CEO of Philanthropy Southwest and ETCF President, Kyle Penney at the United States Capitol in Washington D.C.



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For more information about ETCF, please contact us at 866-533-3823 or info@etcf.org

# EastTexasGivingDay.org

## April 25, 2023

6am - midnight

East Texas Giving Day is an online event that provides critical funding and celebrates the work of our area nonprofits.

**GO** to EastTexasGivingDay.org

**CHOOSE** a cause(s).

**GIVE** a minimum of \$10.

**RAISE** money to help our community!

**Can't wait to give?  
Giving Opens April 3rd!**

## EAST TEXAS GIVING DAY



EastTexasGivingDay.org

April 25, 2023

6am to midnight



315 N. Broadway, Suite 210 • Tyler, Texas  
www.etcf.org  
Toll Free 1-866-533 ETCF (3823)