

Simplified Charitable Giving



ETCF Partners with New Investment Firm

East Texas Communities Foundation has partnered with Graystone Consulting, which provides world-class investment expertise, to manage the charitable funds that have been entrusted to the Foundation.

Graystone will serve as ETCF's Outsourced Chief Investment Officer (OCIO), functioning as an extension of our staff, board and Investment Committee.

ETCF's leadership believes this model will enable ETCF to preserve and grow capital, helping to ensure that donors' charitable assets benefit the community now and for generations to come.

"Our investment committee interviewed several investment consulting firms and chose Graystone based on the experience of their team and their work with similar community foundations," said Kyle Penney,

ETCF President. "Given the complexities of the markets and the responsibility that the Foundation has to steward the resources of many East Texas donors and nonprofit organizations, we believe that utilizing an outsourced OCIO approach will allow our investment pools to perform at their highest potential and respond to changing market conditions."



Melissa Briscoe, CFO at Bethesda Health Clinic and Robin Hampton, Executive Director for East Texas Symphony Orchestra, attended the investment presentation hosted by ETCF.

Paul Cox and Chris Calmer with Graystone Consulting stand with Kyle Penney and ETCF Investment Chair, Scott Terry.

STEAM Endowment Created in Memory of Bullard ISD Elementary Teacher

In 2015, Kathy Sleeper, an early childhood educator, joined Bullard Elementary School to create the district's first Science, Technology, Engineering, Art, and Math (STEAM) Lab.

Mrs. Sleeper passed away in September 2023. However, her love of helping students create and learn will live on through The Kathy Sleeper Endowment for Innovation in STEAM Education.

Through her STEAM lab, Mrs. Sleeper created a learning environment that challenged her students to think critically, problem solve, encourage team-

work and foster creativity all while using grade-level content knowledge.

"This endowment is meant to honor Kathy's memory for years to come," her husband, Lee Sleeper said. "Her passion was teaching, and her involvement in the STEAM lab let her challenge the creativity of hundreds of students."

The Kathy Sleeper Endowment for Innovation in STEAM Education will fund special projects related to the five STEAM areas for Bullard ISD students in pre-K through fifth grades. East Texas Communities Foundation will administer the

endowment, and the Bullard Education Foundation will award the grants.

"ETCF is honored to play a role in recognizing Mrs. Sleeper's commitment to STEAM education," said Kyle Penney, ETCF President. "This investment will not only make an impact on the lives of BISD students now, but on the communities in which they grow up to live and work."



Kathy Sleeper

Tatum Music Charitable Foundation Makes Grants to Area Nonprofits

The Tatum Music Charitable Foundation held at East Texas Communities Foundation (ETCF) in Tyler, Texas, awarded \$50,000 to assist 11 charities serving Gregg County, Texas, and Smith County, Texas.

“East Texas Communities Foundation welcomes the opportunity to help donors fulfill their charitable goals,” said Kyle Penney, President of East Texas Communities Foundation. “Tatum Music Company has exhibited a long history of supporting the needs of our area. These grants will provide much needed resources to assist the critical work of each of these nonprofits”

Nonprofits receiving the grants provide a wide range of critical services and

programs to children living in the counties where Tatum Music Company currently has storefronts.

“Tatum Music company has been blessed to be a part of this community for seventy-five years,” said Doice Gant, owner of Tatum Music Company. “With these grants we wanted to focus on children’s causes and make an impact on the lives of kids in the communities we serve.”

Tatum Music Charitable Foundation grantees include:

Gregg County

- The Martin House Children’s Advocacy Center
- East Texas Casa

- East Texas Special Children’s Projects
- Gregg, Boys and Girls Clubs of the Big Pines
- SeeSaw Children’s Place
- United Way Longview

Smith County:

- Tyler Day Nursery
- Children’s Miracle Network
- Casa for Kids of East Texas
- Children’s Advocacy Center of Smith County
- United Way Tyler

“These grants were made possible because local family’s made investments in music programs across East Texas,” said Grant. “My wife and I wanted to do something special in honor of the stores 75th anniversary, so in 2022, we decided to allocate a portion of each rent-to-own instrument agreement that was completed.” Grant added, “You have to have supportive parents and teachers when you are a band student and we know that some kids are missing that. We wanted to use this opportunity to help those kids that have been dealt a bad hand by giving to organizations helping them overcome life’s challenges.”

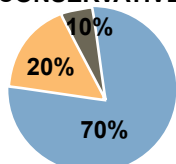


DeAnna Sims with Children’s Advocacy Center of Smith County accepts a grant check from Tim Bagert on behalf of Tatum Music Charitable Foundation.

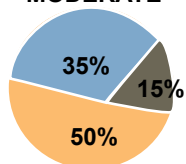


Shirley Qualls, Executive Director at SeeSaw Children’s Place accepts a grant check from David Harper on behalf of Tatum Music Charitable Foundation.

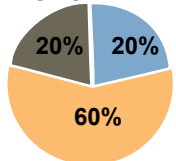
CONSERVATIVE



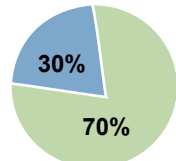
MODERATE



GROWTH



STABLE VALUE



INVESTMENT RETURNS- As of September 30, 2023

| PORTFOLIO | Year-To-Date | 3 Year | 5 Years | Since Inception |
|-----------------------|--------------|--------|---------|-----------------|
| Stable Value | 0.00% | 0.00% | 0.00% | -0.02% (02/23) |
| Conservative- Active | -0.17% | -3.84% | 0.69% | 3.57% (02/03) |
| Conservative- Passive | 0.64% | -2.49% | NA | -1.68% (06/20) |
| Moderate- Active | 4.99% | 1.08% | 3.22% | 5.10% (02/03) |
| Moderate- Passive | 4.81% | 2.46% | 4.30% | 6.24% (09/11) |
| Growth- Active | 8.10% | 3.77% | 4.97% | 6.52% (02/03) |
| Growth- Passive | 5.95% | 5.04% | 5.49% | 8.01% (03/16) |

Additional information available at www.etcf.org. Returns shown are net of fees paid to money managers.

YES For Women Scholarship Benefits Upshur County Students

Yamboree Empowerment Scholarship (YES) for Women will be awarded to females graduating high school from Upshur County, Texas. The scholarship was funded through a collaboration between Gilmer, Texas, natives, Sally Greene and Laura Potter Parsons-Sergent, and the East Texas Yamboree Association.

“Returning to the Yamboree gave us an opportunity to look back and realize how fortunate we were to have had the advantages that we did growing up in Gilmer,” said Greene. “Through the creation of this scholarship, we hope to help young women attend college that might not otherwise have the resources.”

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



Each fall, ETCF Program Officers attend college fairs and high schools across ETCF’s service area promoting available scholarships to students. Applications open online at www.etcf.org January 1, 2024.

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.

Youth Development: Bishop Gorman Catholic School received funding to assist in hosting the 19th annual Macy Chenevert Memorial Basketball Tournament. Ms. Chenevert was diagnosed with Ewing Sarcoma cancer in 2004, and died a few months later at the age of 14. Throughout her treatments, she continued to lead her basketball team both on and off the court demonstrating strength, determination and compassion.

Education: Titus County Reads is a program within Titus County Cares that focuses on comprehensive literacy development by targeting young readers. The program was started in the fall of 2013 and currently has about 115 local adult volunteers who read one-on-one with a 1st grader at one of six Titus County Elementary schools for 30 minutes a week.



1.



3.

Health: The Tyler Bicycle Club is comprised of cycling enthusiasts and volunteers who support the cycling community. In early fall, they received a grant to repair trails and fix erosion areas at both Falukner and Lindsey Park Mountain Bike Trails.



5.

Human Services: In August 2023, a series of wildfires broke out in Maui. The wind-driven fires prompted evacuations, caused widespread damage, and killed 100 people. ETCF fund holders recommended a variety of grants to nonprofits providing both immediate and long-term recovery assistance to people affected by the devastating wildfires.



4.

Education: Christy’s Safe Haven, whose goal is to promote positive youth development in children age 10-19, received funding to provide school supplies for 600 students.

Holiday Hours

ETCF offices will be closed:

Friday, December 22nd

and Monday, December 25th

In observance of Christmas

Monday, January 1st

In observance of New Year's



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facebook.com/SimplifiedGiving

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

EAST TEXAS GIVING DAY



Nonprofit Registration Opens

Thursday, January 25th

Register your nonprofit at

www.EastTexasGivingDay.org



Want to be a part of East Texas Giving Day 2024?

Plan to attend our virtual trainings & learn how to build a successful campaign.

Use your smart phone to scan the QR code or go to www.easttexasgivingday.org for details!