

# Simplified Charitable Giving



## ETCF Appoints Bass as Chair, Adds Two Board Members

East Texas Communities Foundation announces the appointment of Barbara Bass to serve as Chairperson for 2025 and welcomes two new board members: Pat Stacey and Josh Roberts.

"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 possesses a variety of expertise and a shared understanding of how local giving can impact the needs of our community."

Mrs. Bass, has served since 2016 on the ETCF board. Mrs. Bass was a partner at Gollob Morgan and Peddy CPA firm for over 37 years prior to her retirement in 2019 where she launched a new path as a fundraising auctioneer.



Mrs. Bass has served on a variety of nonprofit boards over the years in addition to serving as Mayor of Tyler for six years.



Pat Stacey is the General Manager for KLTU. Mr. Stacey graduated from Stephen F. Austin State University with a major in Radio / Television and a minor in business management. Mr. Stacey joined KLTU in 1996 and has held numerous positions within the company. Mr. Stacey has served on a number of boards of local charities including the Tyler Area Chamber of Commerce, Children's Village, University of Texas at Tyler Patriot Organization and the United Way.

Josh Roberts is a CPA / CFP at Roseman Wealth Advisors. Mr. Roberts grew up in Tyler and after graduating from Baylor University with a degree in financial planning, moved back to Tyler to pursue a master's degree in accounting at UT Tyler. He and his wife Caitlin have one son and are members of South Spring Baptist Church where Josh teaches high school boys on Sunday mornings.



### 2025 Executive Committee:

**Board Chair** – Barbara Bass, Benefits / Fundraiser Auctioneer

**Vice Chair / Governance Chair** – Anthony Brooks, CEO, Azalea Orthopedic & Sports Medicine

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

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

**Grants Chair** – Kris Gusa, CPA, Partner Gollob Morgan Peddy

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

**Policy Chair** – Mark Whatley, President, Burns Commercial Properties

## ETCF Ends 2024 Granting \$19.9 Million

East Texas Communities Foundation awarded more than \$19.9 million in grants to over 800 different nonprofit organizations in 2024.

"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 Health (25%), Education (23%), and Youth Development (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 2025 while working closely with donors to reach their charitable goals."

In addition to the generous grantmaking seen in 2024, ETCF fundholders contributed more than \$12.6 million for future charitable giving. ETCF ended the year with \$137.6 million in charitable assets under management.

ETCF enters 2025 stewarding more than 445 unique charitable funds, established by individuals, families, corporations and nonprofit organizations.

# ETCF Grant Provides New Pavilion at Rose Garden

The Gertrude Windsor Garden Club hosted a dedication ceremony for the new Brown-Wynne Pavilion at the Heritage Rose Garden in the Tyler Municipal Rose Garden.

The Brown-Wynne Pavilion is envisioned as a versatile addition to the municipal rose garden, providing shade for visitors and offering a picturesque venue for small weddings or social events.

When the idea first began, the group knew they wanted to restore and enhance the space. The Garden Club worked with the City of Tyler on creating an approved plan and then embarked on fundraising campaigns to update the hardscape and structures within the Heritage Rose Garden. Nearly \$30,000 in donations were collected from area garden clubs, local organizations, and individuals. However, the COVID-19 pandemic delayed the project, and the funds were set aside temporarily. In total, local individuals and organizations contributed over \$120,000 to bring the pavilion to life, with the largest donations coming from the City of Tyler and the Gertrude Windsor Garden Club Fund at the East Texas Communities Foundation.

The Gertrude Windsor Garden Club has long been dedicated to the enhancement of the Heritage Rose Garden. Since adopting the area in 1986, the Club has completed several projects, including the creation of the great arbor and the brick-and-wrought-iron entryway.



## Plunkett Foundation Awards Grants

Twelve nonprofits serving Gregg, Rusk, Smith and Upshur counties were awarded grants totaling \$100,000 from the T.J. and LaVerne Plunkett Foundation held at East Texas Communities Foundation in Tyler, Texas.

“The Plunkett Foundation has a generous history of supporting East Texas charities,” said Kyle Penney, President of East Texas Communities Foundation. “We are honored to continue their work making grants to worthy nonprofits serving our neighbors in need.”

**Rusk County:**

- Boys and Girls Club of Rusk County: general operating support

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

- Henderson Food Pantry: general operating support

- Keep Henderson Beautiful: inclusive special needs playground at Yates Park

- Rusk County Friends Helping Friends: medical transportation and prescription assistance program

- Salvation Army Henderson Texas Unit: general operating support

**Gregg County:**

- Salvation Army of Longview: Commodities Closet and Food Pantry

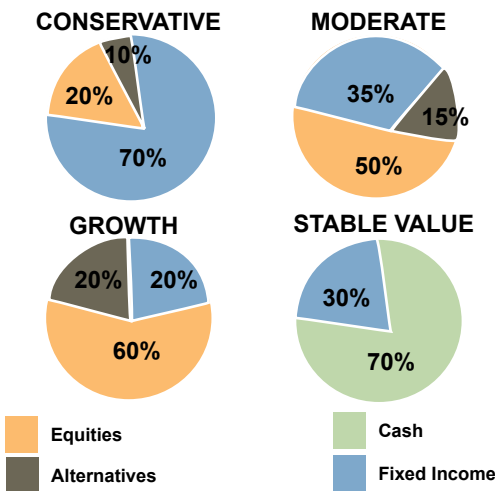
- Texas Shakespeare Festival Foundation: general operating support for 2025 season

**Smith County:**

- Champions for Children: teacher training program and professional development for Rusk County
- Discovery Science Place: mobile planetarium exhibit for Rusk County schools
- Texas Ramp Project: purchase materials to build up to 12 ramps

**Upshur County:**

- Presbyterian Camps at Gilmont: Circle of Friends camp support



INVESTMENT RETURNS As of December 31, 2024				
PORTFOLIO	Year-To-Date	3 Year	5 Years	Since Inception
Stable Value	4.26%	NA	NA	4.37% (02/23)
Conservative- Active	4.70%	-1.41%	1.08%	3.90% (02/03)
Conservative- Passive	4.07%	-0.88%	NA	1.21% (06/20)
Moderate- Active	9.11%	0.97%	4.49%	5.59% (02/03)
Moderate- Passive	9.94%	1.88%	5.99%	7.07% (09/11)
Growth- Active	11.51%	2.46%	7.01%	7.07% (02/03)
Growth- Passive	13.47%	3.21%	8.06%	9.52% (03/16)

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



## Husband Honors Wife's Medical Legacy with Scholarship

The Tabbotha McGee Memorial Scholarship was established by her husband of over thirty years, Broderick McGee. Tabbotha was a 1988 graduate of John Tyler High School. She attended Tyler Junior College where she pursued and received her LVN degree. She went on to complete her RN and Master's degree passing the required competencies to become a Nurse Practitioner.

This scholarship supports graduating students from Tyler ISD schools who plan to attend Tyler Junior College and pursue an LVN degree. A preference will be given to student athletes, students participating in HOSA (Health Occupation Students of America) and students from Tyler High School.

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



# 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:** ETCF fund holders supported the efforts of Longview's Women's Center of East Texas "Stock the Sleigh" program. This program helps support children who have experienced or witnessed domestic or sexual violence, to make sure they have gifts to open on Christmas. Over 160 children were part of the program for 2024.



3.

**Education:** Mt. Pleasant ISD Foundation in Titus County, Texas, provides resources to inspire learning, enrich teaching, and offer extended educational opportunities to teachers and students in the Mt. Pleasant Independent School District. A grant from the Burt and Nancy Marans Charitable Fund will help the Foundation update their website and marketing materials.



1.



4.

**Human Services:** Newgate Mission received a grant in celebration of the 20th Anniversary of their Gobble Wobble Fun Run. Newgate Mission serves homeless, low-income and marginalized populations in Longview, Texas, by providing compassion, hope and dignity. The organization serves between 190 to 210 people every day.



5.

**Environment:** The Big Thicket Natural Heritage Trust works to protect and preserve the land, water, scenic beauty, plants and wildlife, natural, historic and cultural communities of the Big Thicket. Volunteers planted 5,000 native plants as part of the preserves long-term goal of restoring the longleaf pine forest, native grasses and wildflowers that inhabit the ecosystem.

THE BEST WAY  
to predict  
THE FUTURE  
IS TO  
Create IT

Get started today with a fund at...



[www.ETCF.org](http://www.ETCF.org)

*East Texas Communities Foundation supports philanthropy by  
offering simple ways to achieve your  
charitable goals both now and into the future.*

East Texas Communities Foundation  
315 N. Broadway, Suite 210  
Tyler, Texas 75702  
[www.etcf.org](http://www.etcf.org)



[facebook.com/SimplifiedGiving](https://facebook.com/SimplifiedGiving)

For more information about ETCF, please contact  
us at 866-533-3823 or [info@etcf.org](mailto:info@etcf.org)

# EastTexasGivingDay.org

## April 29, 2025

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](http://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 7th!**

## EAST TEXAS GIVING DAY



[EastTexasGivingDay.org](http://EastTexasGivingDay.org)

**April 29, 2025**

6am to midnight

Powered By  
  
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