



## 2018 ANNUAL REPORT

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NORTH TEXAS  
**COMMUNITY  
FOUNDATION**

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*Philanthropic Solutions*

*“Do what you can, with what you have,  
where you are.”*

- Theodore Roosevelt

## DEAR FRIENDS,

At the North Texas Community Foundation, we are privileged to work alongside fundholders, nonprofit leaders, public servants and local residents -- all pulling in the same direction for the community we call home. It's an honor to work with so many good people committed to our region's success.

In 2018, together with our fundholders, the Community Foundation awarded \$24 million in grants to more than 1,000 nonprofit organizations, the majority of which serve Fort Worth and North Texas.

Over the past year:

- Leaders from our business, nonprofit and philanthropic communities provided support for high-quality education through the Early Learning Alliance and READ Fort Worth, achieving national recognition as one of the **top 3 models for early education**;
- The Bowden Opportunity Fund distributed more than \$1M in grants through a competitive grant cycle to address critical needs, including domestic violence, sex trafficking and foster care;
- Arlington's donor circle, Women Inspiring Philanthropy, reached the milestone of investing \$500,000 in local civic improvement and human service programs;
- Professional Advisors helped their clients establish charitable funds valued at more than \$53 million, driving positive change for our community in the days, months and years to come.

From the thousands of inspiring stories in 2018, here are a few that show the incredible generosity of our donors — and how the Community Foundation helps connect their passions and insights with effective ideas, organizations and people.

**We are grateful for your partnership. Your investments today are ensuring a stronger tomorrow.**



**ALFRED SAENZ**  
*Board Chair*



**ROSE BRADSHAW**  
*President/CEO*





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## Wendy and Ric Bonnell: Extending a Helping Hand to Their Neighbors

As TCU alumni and skilled pediatricians, Wendy and Ric Bonnell are dreamers and doers. Their commitment to volunteerism and philanthropy led them to establish a fund at the North Texas Community Foundation to provide healthcare for their neighbors in need.

In 2009, the Bonnells' desire to improve access to quality healthcare for uninsured families in Hood County inspired them to help launch Ruth's Place, a free medical clinic. Originally based in a singlewide trailer, the organization now occupies a permanent building in Granbury, thanks to the generous support of individual donors and corporations.

At Ruth's Place, Wendy and Ric are part of a team of volunteer doctors and nurses who provide a holistic approach to rural healthcare, including dental services. The next phase of development will add a full-time nurse practitioner – and North Texas Community Foundation fundholders are joining the cause to help make it happen.

The organization operates a weekly food pantry in collaboration with Granbury First United Methodist Church, offers monthly free diagnostic auto clinics, and hosts ESL and Life Skills classes. Without Ruth's Place, many residents wouldn't have access to these life-changing services.

The Bonnells are incredible examples of Teddy Roosevelt's entreaty to "do what you can, with what you have, where you are." **Together, they're strengthening the wellbeing of their hometown by doing the work they love most.**





Photo provided by Texas Wesleyan Marketing & Communications

## Nick and Lou Martin: Leading the Project of the Century at Texas Wesleyan University

Ram pride runs deep in the family for Nick and Lou Martin. Lou’s grandfather, James B. Baker, Sr., was instrumental to Texas Wesleyan University’s development, serving on the Board of Trustees from 1895 to 1912. His son, Edward Lawrence Baker, Sr., kept the family tradition alive through 50 years of faithful Board service, 16 in the role of Chairman. In 1994, Edward’s daughter, Lou, took up the family baton, and she continues to serve on the board’s executive committee to this day.

The Baker family’s 120 year old friendship with the university has inspired Nick and Lou Martin to leave an incredible legacy of their own. Through their donor-advised fund at the North Texas Community Foundation, the Martins have provided lead gifts for major campus improvements, including the Nicholas Martin Performance Hall, the Baker-Martin House, Lou’s Place and the school soccer field.

**In 2018, the Martin’s fund kick-started the most significant capital improvement project at Texas Wesleyan in over a century: a new student center in the heart of campus.** Upon completion in summer 2019, the Nick and Lou Martin University Center will be the first centrally-located hub for student life, housing admissions, study lounges, a food court and student meeting rooms. According to Texas Wesleyan President Slabach, the 44,000-square-foot center is a “game-changer” for the school.

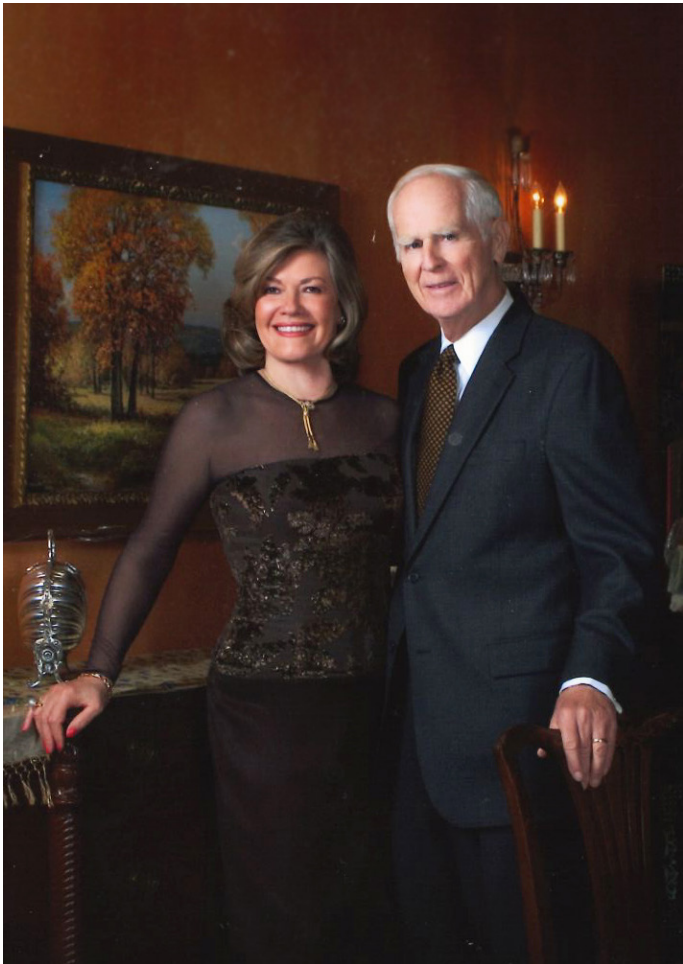


Photo provided by the Martin Family



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## Shay and John Wells: Funding the Needs of Today and Tomorrow

If any couple personifies the phrase “the gift that keeps on giving,” it’s Shay and John Wells. For years, they have been proud supporters of their community and the causes close to their hearts. While they have always been dedicated to addressing current needs, over time it has become increasingly important to them to invest in our community’s future. In 2010, they established an endowed fund at the North Texas Community Foundation so their impact will last in perpetuity.

The Sharon Ann McCulloch-Wells and John W. Wells Endowed Fund sustains organizations that help vulnerable individuals, children and families living in Tarrant and Hood Counties thrive. For example, the Wells are passionate about providing scholarships to (HS)2, a STEM-based summer program that prepares underserved students for college success. Over the program’s 12-year history, 100% of participants have matriculated to college.

Shay and John are also known for championing projects that reflect their deep connection to our local community. The Wells recently developed a relationship with Cuisine for Healing, which delivers nutritious food to people combating disease. In 2018, their fund helped the organization relocate to a permanent home adjacent to the Medical District.

Thanks to The Sharon Ann McCulloch-Wells and John W. Wells Endowed Fund, these two generous individuals will continue to improve the lives of North Texans well beyond their lifetimes.

***“You have to support causes close to your heart or the groups doing the work won’t be there. We trust that the Community Foundation will create a lasting impact for many years to come.”***

-John Wells





# Juan and Mary Wilson: Leaving a “Mighty Fine” Legacy for Fort Worth

Mary and John “Juan” Wilson passed many lessons to their children, including a passion for their community and the importance of thinking of others before themselves. Throughout Juan’s career in the oil and cattle industries, he was known as a true gentleman, sealing a deal or acknowledging an encounter with a genial smile and a handshake.

During their lives, the Wilsons provided generous personal and financial support to organizations that helped make Fort Worth a culturally vibrant community. They opened a donor-advised fund at the North Texas Community Foundation to structure their giving and leave a lasting impact on the city they loved.

Now that Mary and Juan have both passed away, their children continue to work with the Community Foundation to fulfill their parents’ philanthropic goals. While all three siblings have moved out of the area (although one continues to spend part of the year in Fort Worth), they honor their parents’ memory by continuing to support the venerable Fort Worth institutions that make the city a better place to live and that their parents loved. In 2018, the Wilson Fund supported 22 organizations, including Saint Patrick Cathedral, where they attended Mass daily, the Amon Carter Museum, the Modern Art Museum of Fort Worth, the Van Cliburn Foundation, UT Southwestern Medical Center, the TCU Ranch Management Program, Historic Fort Worth and the Fort Worth Garden Club, among others.

**Mary and Juan embraced the virtue of charity in all its forms. Now, the North Texas Community Foundation is honored to work with their family to enhance the community they cherished.**



*“Our parents loved Fort Worth. It would please them to know that they are still supporting their beloved community beyond their lifetimes. We are grateful to the Community Foundation for helping us to honor their memory.”*  
-John H. Wilson, III



Photo courtesy of TCU Ranch Management Program





Graduation Day for  
ToolBox grant recipient  
Parent University at  
Manuel Jara Elementary School  
  
Photo by Leo Wesson

# Local Investors: Building Stronger Neighborhoods through ToolBox Grants

When donors come together to support smart solutions, big things happen. Thanks to the generosity of 29 donor advisors and local private foundations, the ToolBox Grants Program at the North Texas Community Foundation is strengthening organizations serving our most vulnerable neighborhoods.

In 2018, ToolBox investors empowered the North Texas Community Foundation to award \$316,000 in grants to 33 area nonprofits. The current grant cycle builds the capacity of nonprofits serving seven Tarrant County neighborhoods experiencing the highest levels of poverty, including Las Vegas Trail, Como, Northside, Morningside, East Seminary, Stop Six and East-Central Arlington.

Families living in these neighborhoods are disproportionately affected by a lack of access to education, health, income and employment resources. By building the capacity of nonprofits serving these communities, the Community Foundation and its donors are strengthening services to improve the lives of local families.

Since its inception in 2010, **ToolBox has provided \$2.4 million in grants for critical capacity building to more than 100 nonprofits serving Tarrant County**, strengthening our community for the long haul.

## ToolBox Investors

**NORTH TEXAS COMMUNITY FOUNDATION ENDOWED FUNDS:** Alann P. and Charles F. Bedford Endowment Fund, W.I. Fleetwood Memorial Unrestricted Endowment Fund, Don and Barbara Kirk Endowment Fund, Hazel Vaughn Leigh - Youth Fund, Verna B. and John B. Stubbs Fund, Martin H. and Helen M. Wikierak Memorial Fund for Abused Children, Youth Assistance Fund

**CORPORATE/PRIVATE FOUNDATION PARTNERS:** Amon G. Carter Foundation, Sid W. Richardson Foundation, The Thomas M., Helen McKee & John P. Ryan Foundation, Inc., Wells Fargo Foundation

**NORTH TEXAS COMMUNITY FOUNDATION LEAD INVESTOR FUNDS:** Mr. and Mrs. L.O. Brightbill, III Charitable Fund, Hodges Fund, Margaret Mann Wilson Fund, Si and Buck Martin Legacy Fund, George C. and Sue W. Sumner Fund, Lisa and Burch Waldron Charitable Fund, Sharon Ann McCulloch-Wells and John W. Wells Endowed Fund, Doris C. and Harry K. Werst Charitable Fund

**NORTH TEXAS COMMUNITY FOUNDATION DONOR-ADVISED FUNDS:** Anonymous Fund, Bowden Family Fund, Robert A. and Jane W. Ferguson Charitable Fund, Allen and Janet Hodges CCG Fund, Gail W. and W.A. Landreth, Jr. Charitable Fund, Martha V. Leonard Fund, Doug & Jayne Orr Charitable Fund, Stevenson Family Charitable Fund, Vernell and Debra Sturns Charitable Fund, Melissa and Andrew Winborn Charitable Fund

*“Toolbox connects donors and Community Foundation staff in support of efforts to financially strengthen our local nonprofits so that they are in a better position to carry out their specific missions. With strong nonprofit partners we can make a bigger difference. This is what makes this town great, people coming together for the betterment of the community we love.”*

- Burch Waldron



\$322+

MILLION IN  
ASSETS

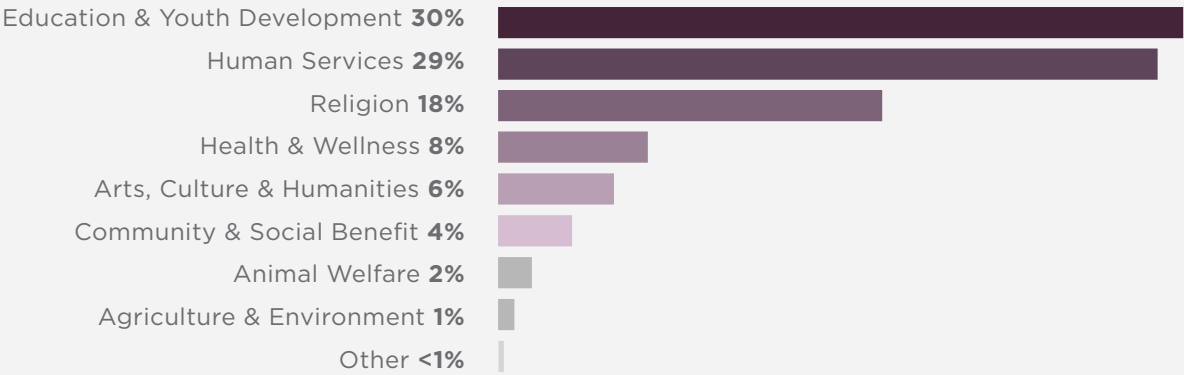
\$53+

MILLION IN  
NEW GIFTS

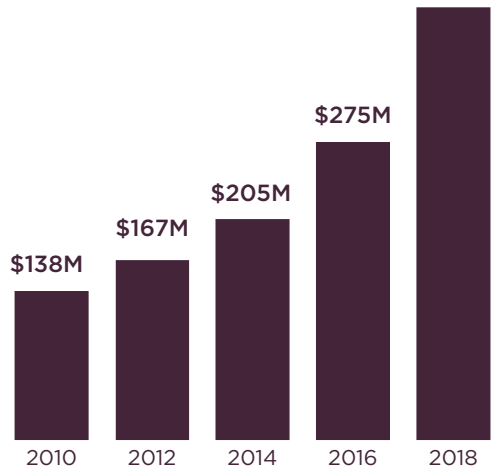
\$24

MILLION IN GRANTS  
AWARDED

GRANTS AWARDED



ASSET GROWTH



INVESTMENT MANAGERS

Mason Investment Advisory Services, Inc.  
Luther King Capital Management

OUTSIDE INVESTMENT MANAGERS

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We thank the professional advisors who recommended the Community Foundation to their clients in 2018.

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Professional advisors play a key role in helping clients structure their charitable giving plans. With the advisors' input, we match their clients with the appropriate giving tools to achieve the desired objectives with maximum efficiency.



Pictured above: Phil McCrury, Rose Bradshaw, Lisa Jamieson and Chuck Milliken

The North Texas Community Foundation was honored to have these esteemed attorneys present charitable giving strategies at a recent Tarrant County Bar Association Business & Estate Section meeting.

PROFESSIONAL ADVISOR  
OF THE YEAR AWARD



Jeffrey N. Myers is a shareholder of Bourland, Wall & Wenzel, P.C. and has more than 27 years of legal experience. Jeff represents numerous individuals, families, and businesses, and engages in a broad range of estate, charitable gift, wealth transfer, and business planning, with an emphasis on transfer tax planning. Jeff and his wife Winkie have been married for 32 years and have three children, one of whom serves in the military, a daughter-in-law and one grandchild.

*"The North Texas Community Foundation is a vital resource in our community. I know that when I refer a client to the Community Foundation they will turn my client's charitable vision into tangible results."*

- Jeffrey N. Myers, Bourland, Wall & Wenzel



Welcome, New Funds

Whether they opened a donor-advised fund to give back to their favorite causes, a field of interest fund to support a special area of interest, or an agency endowment fund to support their nonprofit’s mission in perpetuity, our fundholders are responding to community needs now and beyond their lifetimes.

Thank you for entrusting us with your philanthropy.

- 4C Charitable Foundation
- Harold Anglin Foundation Fund
- Ruth L. Anglin Fund
- Anonymous Fund
- AWARE Foundation Award Fund
- Bowden Family Fund
- Buehler Family Fund
- The Coltharp Fund
- Tom and Deborah Deas Charitable Fund
- Marilyn and Marty Englander Family Fund
- Facebook Community Action Grant Fund
- Fitzgerald Family Fund
- Gerson Charitable Fund
- Jesse and JimAnne Hejny Family Charitable Fund
- Honey B Foundation, a Hive of Grace
- Iles Family Charitable Fund
- Jaggi Family Charitable Fund
- Lowrance Johnson Oudt Family Charitable Fund
- Meredith & Stephen Luskey Family Charitable Trust
- Barbara L. Martin Charitable Fund
- Brad and Lauren McPherson Fund
- Milliken Family Fund
- Prime of Life Research Fund
- Vess Family Fund
- Walker Family Trust

Friends of the Community Foundation

Our Friends ensure that the North Texas Community Foundation is a lasting resource that improves the community’s well-being. We are grateful for their generosity and support.

For more information, visit: [northtexascf.org](http://northtexascf.org).

BENEFACTOR

- Cindy & John Adams\*

Stewart & Betty Alcorn

Carol & Denny Alexander\*

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Finance



## OUR MISSION

To strengthen the community through civic leadership and encourage philanthropy by providing community knowledge and reliable stewardship to those who wish to fulfill their charitable goals in a meaningful way, during and beyond their lifetime.

## OUR CORE VALUES

### ◆ SERVE

We **tailor** our services to help local families, individuals and corporations achieve their charitable goals.

### ◆ STEWARD

We **oversee** the gifts placed in our care with an eye toward permanence and growth by employing sound investment strategies.

### ◆ IMPACT

We help **ensure** fundholders' charitable gifts are used effectively to fulfill our community's most critical needs while honoring donor intent.

### ◆ GROW

We **expand** charitable giving by being proactive, responsive, flexible and solution-focused partners for our fundholders and their professional advisors.

### ◆ INSPIRE

We **ignite** powerful, rewarding philanthropy throughout the region by lifting up the many ways in which generous donors invest in effective nonprofit organizations to make an impact in our community.







**DONOR SERVICES | CUSTOMIZED PHILANTHROPY | COMMUNITY LEADERSHIP**

Fort Worth Club Building 306 West 7th Street, Suite 1045 NorthTexasCF.org 817.877.0702

COVER ARTWORK: *View From the Museum of Modern Art at Fort Worth* by Marino Chanlatte