

Waco Foundation

2 O 2 3 ANNUAL REPORT



VALUES

STEWARDSHIP

INTEGRITY

HUMILITY

COLLABORATION

COMMUNICATION

INNOVATION

EQUITY

LEARNING

NEUTRALITY

MISSION

Waco Foundation promotes solutions to community challenges, strengthens nonprofits, engages philanthropists and manages charitable assets in order to improve quality of life in our community.

VISION

Waco Foundation drives community change by striving to transform key institutions, ensuring a high quality of life for all our residents. We seek to innovate Waco's economy and civic infrastructure so that it can:

Address the greatest barriers to prosperity for all

Be inclusive of the full community

Attract and enable the best and brightest in service of Waco's future

Build capacity within community leadership for collaborative work to address our most pressing problems

BOARD OF TRUSTEES



SHERMAN AYRES

CHAIR

Consultant/CEO, S.R. Ayres &
Assoc., Bus. Consultancy



CHRIS McSWAIN

VICE-CHAIR

Photographer; Community

Volunteer



SOO BATTLE, M.D.
SECRETARY/TREASURER
Medical Advisor & Child Sexual Abuse
Examiner, The Advocacy Center



MALCOLM DUNCAN, JR.

Duncan Motors,



MONTE HULSE Chairman, First Nat'l. Bank of Central Texas



DILLON MEEK

Mayor, City

of Waco



KRISTEN MYNAR
Partner, Naman, Howell,
Smith & Lee, PLLC



MIKE RAYMOND

Community

Volunteer



MELLI WICKLIFF

Community

Volunteer



CHARLES WILLIAMS

President, DFW West Region and
Baylor Scott & White Fort Worth



AARON ZIMMERMAN
Rector, St. Alban's
Episcopal Church

Dear Community.

Waco Foundation was established 65 years ago with the mission of improving quality of life in McLennan County. While the work has changed over the years, the Foundation's commitment to building a stronger community remains steadfast.

Over the last year, great strides were made in several of our priority areas. For example, when Waco Foundation received a \$9 million bequest from Malcolm Duncan Sr.'s estate to increase college completion rates, we conducted a rigorous evaluation of our existing scholarship program and ultimately launched an enhanced program called Duncan Scholars. Duncan Scholars still has the goal of making college affordable for local students, but expands assistance to include academic and social service support, along with full-tuition scholarships.

While we continue the highly sought-after Race Equity Institute trainings, we also added smaller programs for those who want to further their journey. We are proud of the way this work has allowed the Waco community to take charge of our own conversation about race, removed from national narratives and instead focused on developing a greater understanding and ability to relate to our neighbors.

We are also excited to share we have moved...again. We are now the proud owners of the former First Federal Savings and Loan building located at 1224 Austin Avenue. This was an exciting move for the Foundation as the building has enough space to eventually house a collaborative environment for nonprofits to office, host events and meetings, and serve as a charitable resource hub for Waco.

While 2023 has been a great year for Waco Foundation, we know our work continues. We thank each of you for your support in making Waco a better place for all. For Waco. Forever.





SHERMAN AYRES BOARD CHAIR



ASHLEY ALLISON EXECUTIVE DIRECTOR

YOUR HOME TO CHAMPION LOCAL





"The race equity training and workshops affirm much of what we know about community and public health - racial disparities exist and are well-documented. Equitable access and service is still the goal. Waco Foundation's commitment to helping all of us talk about this in a constructive, non-partisan way leads to a deeper understanding of the challenges many of our neighbors face. Together, we can close the gap, and make the 'healthy choice the easy choice' for all Wacoans."

LASHONDA MALREY-HORNE

DIRECTOR, WACO-MCLENNAN COUNTY PUBLIC HEALTH DISTRICT

DuncanScholars

When Malcolm and Mary Ruth Duncan decided 27 years ago to make sure all local students have the opportunity to earn a college degree, they couldn't have known how deep and meaningful the impact of their work would be. Today, because of the Duncans' vision and the generosity of many donors, more than 14,000 local students have received \$12 million in grants and scholarships, affording each of them a brighter future.

In 2021, Malcolm Duncan's \$9 million legacy gift was given to Waco Foundation to ensure the work he started almost three decades ago would continue in perpetuity. His gift also gave the Foundation an opportunity to research potential programming changes that would further increase college completion rates while eliminating student debt. In collaboration with Waco ISD, McLennan Community College, Baylor University and other local partners, a more comprehensive version of the MAC Program was launched last year under the name of Duncan Scholars.

Duncan Scholars serves students graduating from Waco ISD who plan to attend McLennan Community College. Participants in the program receive free tuition and fees, and if they go on to complete their four-year degree at Tarleton or Texas Tech through the University Center, or Baylor University, they are eligible for full-tuition scholarships, resulting in a debt-free education. In addition to the increased financial support, Duncan Scholars students also receive personalized advisement and college navigation assistance, career learning opportunities and access to emergency funds to cover things like food insecurity, housing issues and transportation barriers.

In 2023, the first cohort of Duncan Scholars graduated from high school and began their college journey at McLennan Community College. These 32 students are committed to completing their degrees through hard work, persistence and support from Duncan Scholars.



RACE EQUITY

In 2016, Waco Foundation offered a training facilitated by Race Equity Institute to a few dozen community leaders in an effort to take charge of our community's conversation about race and equity. Since then, and in partnership with Cooper Foundation, more than 300 local leaders have participated in high-quality trainings that provide local, statewide and national data to educate community members about the history of racism and how it has influenced the institutions we interact with every day.

Those 300 individuals represent more than 50 different entities including business owners, nonprofits, municipalities, universities, school districts, chambers of commerce and faith communities. Several of these institutional leaders not only shared lessons learned with their respective staff and boards, but also drafted equity statements, named ongoing learning as an agency value, established Diversity, Equity and Inclusion

goals and tasked employee resource groups to help move their racial equity work forward. In addition to delivering trainings for the community, last year Waco and Cooper Foundations partnered with other organizations like Waco Family Medicine and McLennan Community College to foster relationship building, ongoing dialogue and opportunities for learning. Programs like Together We Dine Waco and Race-Based Caucusing give community members a chance to participate in facilitated dialogue in small group settings.

Waco Foundation will continue applying a threepronged approach to race equity:

- Building a common language & understanding
- Normalizing racial equity as a point of conversation and community value
- Supporting those interested in applying a racial equity lens to their body of work or institution



WHILE WE HAVE A LONG ROAD AHEAD OF US, WACO FOUNDATION IS PROUD OF ALL THE
WORK THAT IS TAKING PLACE TO CREATE AN ENVIRONMENT FOR MEANINGFUL SOLUTIONS
AND PATHWAYS TO PROGRESS, ALL TO IMPROVE QUALITY OF LIFE IN OUR COMMUNITY.

10

YOUR HOME FOR
NONPROFIT



"We have been working through a comprehensive reinterpretation plan to make the museum more accessible and inclusive for the entire community. The bottling room exhibit historically told our story through the lens of company owners, not the workers. Waco Foundation's grant enabled us to update the exhibit to share a more complete history with diverse perspectives, including those from the many immigrant, female, Hispanic and Black Wacoans, who are integral to the Dr Pepper story. People like Julius Genecov who fled with his family from religious persecution in Russia and arrived in Waco in the early 1900s. These are the people who make up our history."

CHRIS DYER, PRESIDENT AND CEO, DR PEPPER MUSEUM

WACO FOUNDATION INVESTED

\$6 million

INTO THE COMMUNITY LAST YEAR IN THE FORM OF GRANTS, SCHOLARSHIPS AND COMMUNITY PROGRAMMING, ALL TO IMPROVE QUALITY OF LIFE IN MCIENNAN COUNTY

MCLENNAN COUNTY NONPROFITS SUPPORTED

Advocacy Center for Crime Victims and Children Fuzzy Friends Rescue

American Heart Association

Animal Birth Control Clinic. Inc.

Baylor Scott & White Central Texas Foundation

Baylor University

Baylor University - Truett Seminary

Bosque Animal Rescue Kennels

Bosque County Clifton Rotary Club Scholarship Fund. Inc.

Bosaue Museum

Cameron Park Zoological and Botanical Society

Care Net Pregnancy Center of Central Texas, Inc.

Caritas of Waco

Carver Park Baptist Church

CASA of McLennan County

Catholic Charities of Central Texas

Cen-Tex Hispanic Chamber of Commerce

Central Presbyterian Church

Central Texas Senior Ministry

Church Under the Bridge

City of Mart

Communities in Schools of the Heart of Texas

Community Doulas of Waco

Compassion Ministries of Waco, Inc.

Cultural Arts of Waco

Dayspring Baptist Church

East Waco Empowerment Project

Family Abuse Center

Fellowship of Christian Athletes

First Baptist Church of Waco

First Presbyterian Church

Friends of the Waco-McLennan County Library

Girl Scouts of Central Texas, Inc.

Gospel Cafe

Grassroots Community Development

Greater Waco Legal Services

Heart O' Texas Fair and Rodeo

Heart of Texas Behavioral Health Network

Helping Hands Ministry

Historic Waco Foundation

Humane Society of Central Texas

Jewish Federation of Waco

Keep Waco Beautiful Inc.

Klaras Center for Families

KWBU - Brazos Valley Public Broadcasting

Foundation

Lake Shore Baptist Church

McLennan Community College

McLennan Community College Foundation

McLennan Community Investment Fund

McLennan County Pack of Hope

Meals on Wheels Waco

Mentoring Alliance

Methodist Children's Home

Midway ISD Education Foundation Mission Waco Mission World, Inc.

Planned Parenthood of Greater Texas Inc.

Providence Foundation, Inc.

Providence Hospice

Special Olympics Texas, Inc. - McLennan County

Chapter

St. Alban's Episcopal Church

St. Louis Catholic Church

Startup Waco

Storybook Christmas

Susan G. Komen® Greater Central and East Texas

Talitha Koum Institute (Crossties Ministries)

Temple Rodef Sholom

Texas Rural Funders

The Arc of McLennan County

The Art Center of Waco

The Baylor Line Foundation

The Cove, Heart of Texas

The Mentoring Alliance - Waco

The Salvation Army - Waco Corps

Tovs for Tots

Transformation Waco

Unbound Waco

United Way of Waco-McLennan County

Vanguard College Preparatory School

Waco Chamber of Commerce Community

Development Foundation

Waco Civic Theatre, Inc. Waco Creative Art Center

Waco Family Medicine

Waco Family Medicine Foundation

Waco Habitat for Humanity

Waco Mammoth Foundation, Inc.

Waco Music Teachers Association

Waco Symphony Association, Inc.

Waco Symphony Council

Waco Symphony Foundation

Waco-McLennan County Library

World Hunger Relief, Inc.

Youth Chorus of Central Texas



grantmaking programs

Waco Foundation invests in both proactive and responsive grantmaking programs that improve local quality of life across the community. The grantmaking process is designed to ensure the Foundation remains inclusive with regard to the causes, concerns and perspectives of area nonprofits, and responsive to the financial challenges they face.

McLennan County nonprofits have a range of grant programs available through Waco Foundation, including operating, large and small capital, immediate impact and critical needs. Information about award amounts, deadlines and application details can be found at wacofoundation.org

Grassroots Waco is a local nonprofit committed to creating a brighter future for children, neighbors and communities. They work to cultivate healthy neighborhoods, provide homeownership resources and equip community leaders with tools to create positive change.

Grassroots Waco was recently awarded an Immediate Impact grant from Waco Foundation for their Growing Healthy Food: One Block at a Time initiative. The program gives neighborhood blocks an opportunity to create community gardens using their own yards as the garden plots. This grew out of one resident's interest in starting a garden and encouraging neighbors to share in the process and enjoy the fruits (and vegetables) of their labor. Grassroots Waco decided to take the success of one garden and expand it to other neighborhoods to generate a deeper sense of community connectedness. The Foundation is honored to be a small part of bringing people together to cultivate a healthier, stronger and brighter future for Waco.



GRASSROOTS WACO RECEIVED AN IMMEDIATE IMPACT GRANT FOR GROWING HEALTHY FOOD: ONE BLOCK AT A TIME.

I've enjoyed the interaction with other gardening lovers along with our enthusiastic and patient instructor. It is so important to know your soil and the appropriate season to plant veggies and fruits. Everything has been hands-on with lots of visuals and an overall great experience.

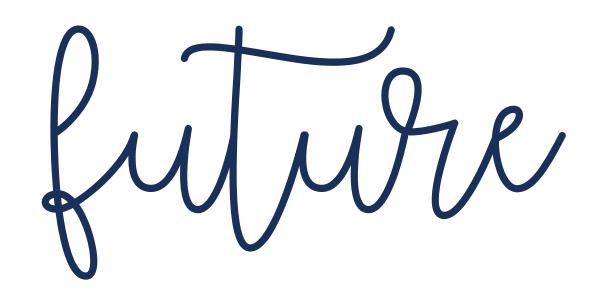
RACHEL SOLIS,

GRANT PARTICIPANT





YOUR HOME TO INVEST IN WACO'S







MEGAN HENDERSON



MARY NELDA MASSEY

Pie Society Member

PIE SOCIETY

When Waco Pie Society member Mary Nelda Massey passed away in December 2021, she designated the Humane Society of Central Texas as a beneficiary of her estate. As an animal lover, Mrs. Massey's passion for the humane treatment of stray animals led to her co-founding what is now the Humane Society of Central Texas. Though her gift can be counted in dollars and cents, the legacy Mrs. Massey left to the Humane Society is immeasurable.

Whether your inspiration comes from creating a greater sense of purpose while living, preserving memories, or setting an example for future generations, there is no better charitable gift than designating a nonprofit as a beneficiary in your estate plan. Research tells us the largest and most impactful gift a donor makes comes from assets they will not use during their lifetime.

Pie Society, the legacy society of ALL McLennan County nonprofits, recognizes donors who commit to leaving a lasting legacy for the causes they care about, just like Mrs. Massey. The promise to leave a portion of your estate – or a piece of your pie – to charity makes you a Pie Society member – and we want to hear from you! Members decide the amount of the gift, the charity or charities that will benefit, and may choose to remain anonymous.

Mrs. Massey's legacy will forever be ingrained in the fabric of her adopted hometown and that of her nonprofit beneficiary. For us, she is the second member of Pie Society to fulfill her commitment to leave a planned gift. Waco Foundation's Pie Society initiative seeks to capture the power of planned gifts to ensure our nonprofit organizations are around for future generations and donors' philanthropic goals are fulfilled.

Become a member with a gift of your estate through a beneficiary designation of a qualified retirement plan, life insurance policy, or specific gift in your will or trust. Think about the impact we can have if we all share just a piece of our pie with McLennan County nonprofits.

WACOPIESOCIETY.ORG —



PIE SOCIETY MEMBERS

Mrs. Sharon Allison

Anonymous

Mr. and Mrs. Sherman R. Ayres

Mr. Ray & Dr. Janet Bagby

Drs. Jacob and Soo Battle

Mr. and Mrs. Ron L. Beal

Ms. Libby Bellinger

Mr. and Mrs. Mike Bidwell

Mr. and Mrs. Brian P. Bivona

Mrs. Georgia Brady

Mr. and Mrs. Jay Bryngelson

Ms. Delisa Burnell-Smith

Mr. and Mrs. Steve Cates

Mr. and Mrs. George Chase, III

Mr. and Mrs. Tom Chase

Mrs. Kayla Citrano

Mr. Jim R. Clifton

Mr. D. Jack and Mrs. Gail C. Davis

Mr. Christopher DeCluitt

Mr. and Mrs. John Derrick

Mr. and Mrs. David Dickson

Mrs. Ashley Allison and Mr. David Dulski

*Mr. Malcolm Duncan, Sr.

Mrs. Bronson B.T. Eden

Mrs. Nicole Fanning

Mr. Trey Fowlkes

Mr. and Mrs. Holt Getterman

Mr. and Mrs. Jay Goble

Mr. and Mrs. Somers Goodman

Mrs. Amy A. Grant

Mr. and Mrs. David E. Guyer

Mr. and Mrs. Jim Haller

Mr. Elton Hall

Mr. and Mrs. Harry I. Harelik

Mr. Steve and Mrs. Tammy Harralson

Mrs. Megan Henderson

Mr. Rudy Herzog

Mr. and Mrs. Carlos Hinojosa

Mr. and Mrs. Taylor Hobbs

Ms. Lisa Hull

Mr. Monte R. Hulse

Mr. and Mrs. Larry D. Jaynes

Dr. George H. Jurek

Mr. Roane Lacv. Jr.

Mr. and Mrs. Frank L. Levy

Ms. Mary Nelda Massey

Mr. and Mrs. Andy McSwain

Mr. Jack and Mrs. Nancy Munson

Mr. & Mrs. Tim Musselman

Mr. and Mrs. Roy Nash

Mr. and Mrs. Pat Nowotny

Mr. and Mrs. Tom R. Pagel

Mr. and Mrs. James Rainey

Mrs. Doreen Ravenscroft

Mr. and Mrs. Mike Raymond

Dr. and Mrs. Ross Reagan

Ms. Jennifer A. Richie

Mr. and Mrs. Clifton Robinson

Mr. and Mrs. Stan Schlueter

Mr. and Mrs. Adrian Schmidhauser

Mr. and Mrs. Larry Smith

Ms. Carrie Spivey

Mr. and Mrs. George Springer

Mr. and Mrs. Ford Taylor

Mr. and Mrs. J. Heyward Taylor

Ms. Mia Thomas

Mr. and Mrs. Robert E. Tunmire

Mr. Shane Turner

Ms. Linda Weaver

*Members who fulfilled their promise

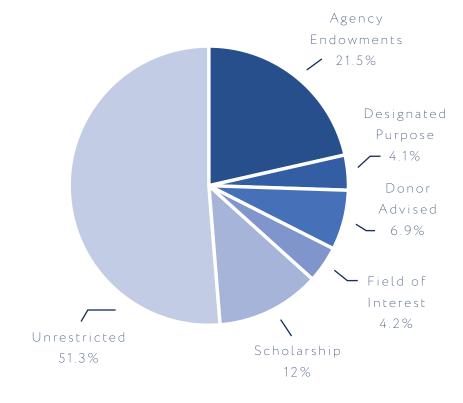
INVESTMENTS

WACO FOUNDATION

ASSETS

TOTAL CHARITABLE ASSETS UNDER MANAGEMENT:

\$133,978,854



Waco Foundation manages more than \$130 million in charitable assets held in 250 component funds including nonprofit endowments, donor advised funds, field of interest funds and scholarships. The Foundation invested over \$6 million in grants, scholarships and nonprofit programming last year alone. Waco Foundation's Board is charged with protecting these assets for long-term good to ensure local charities serving the community can carry out their missions and make Waco a better place for generations to come.

INVESTMENT COMMITTEE

Sherman Ayres

Malcolm Duncan, Jr.

Jed Cole

Kyle Deaver

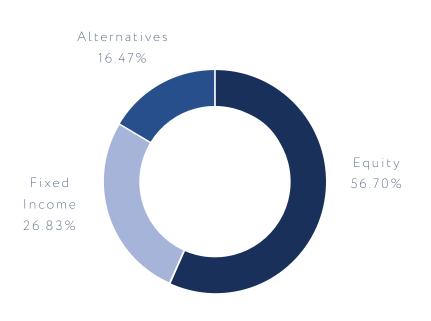
David Dickson

Brian Webb

Waco Foundation is committed to protecting the long-term value of the community's charitable assets. Over the last year, the market experienced significant swings resulting in investment losses across the board in almost all asset classes. Waco Foundation's investment strategy is designed to weather volatile markets and provide fund holders with a consistent stream of income and purchasing power over time. This is achieved with a carefully designed, diverse asset allocation strategy which includes both active and passive investment management and a balanced approach to managing risk and return.

While the Foundation was no exception to the market's fluctuations, assets have rebounded after last year's dip due to the diligent oversight of the Investment Committee and consultant, Neuberger Berman. Proper stewardship is essential to the Foundation's ability to build philanthropic funds in service to the community, and Waco Foundation is honored to serve as a safeguard for Waco's charitable assets.

PERMANENT HORIZON POOL -ASSET ALLOCATION



21 / WACO FOUNDATION

YOUR HOME FOR PHILANTHROPIC





NICK AND ANNA-LOUISE DEAVER

23 / WACO FOUNDATION

INDIVIDUALS

Margaret Abel and Karen A. Prentice Antoinette Akers Amy Akins Mr. and Mrs. David Akins Jane Allen Twila Renee Allen Dr. and Mrs. Walter Allison Judy Anderson Keith and Kimberly Anderson Mike L. Anderson Mr. Larry and Mrs. Claudia Anderson Robert Anderson Darlene G. Arrington Luis Fernando Arroyo

Jessica Attas Mr. and Mrs. Sherman R. Avres Casie Bailey

Dr. Paul and Patricia Bailey Margie Barker-Glockzin

Robert Barkley

Karen Barlow Dr. and Mrs. Marc Barrett James A. Barrett and Charm K. Barrett

Carol Spears Barrows Shirley Batson Drs. Jacob and Soo Battle Mr. and Mrs. Benjy Bauer

Mr. and Mrs. Joseph G. Beard Mr. and Mrs. Steve Beard Dr. and Mrs. Gary L. Becker

Mrs. J.B. Bell Mrs. Jeanette Bell

Mr. and Mrs. Randell W. Bell Mr. and Mrs. Mike Bidwell

Tommy R. Birkes

Mr. and Mrs. Brian Bivona Les and Jimmie Farmer Cindy Boney

Margaret Bonner Elaine F. Botello Mr. John D. Bowen

Dr. Cassy Burleson

Joshua L. Caballero

Mrs. Nancy H. Callan

Ms. Delisa Burnell-Smith

Greg Bowles Elizabeth A. Bozzell Chris and Joyce Brammer

Mary Pat Braunstein Leslie Bray

Dr. James G. Brooks, Jr. Douglas Michael Getson Patricia L. Brown

Mr. and Mrs. Spencer Brown, Jr. John R. Gidley Mary Bryant

Mrs. June Bryngelson Tim and Margaret Gilbert Stephen Warren Burk

> Leah Gilliam Brenda Gochenour Terry L. Goodrich

Mr. and Mrs. Henry L. Campbell, Jr. Melinda Greger Raymond William Carey Pete and Michele Groetzinger

James Phipps Chase Mr. and Mrs. Tom Chase Mr. and Mrs. George Chase

Kevin Cherry Mr. and Mrs. Tom Clowe June T. Cody

Wanda Coker Mr. and Mrs. Joshua Connor Kathryn Cornwell

Dr. and Mrs. Stephen H. Corwin Mrs. Adayre L. Crabb

Elizabeth and John Croley Darlene Curie and Rick Bush

Julie Curlee Mr. and Mrs. Bob Davis

Mr. D. Jack and Mrs. Gail C. Davis Paula Dawson

Sonia Dawson Diane and Kyle Deaver

Ellen and Ray Deaver John Deaver

Susan and Terry DeWitt Mr. and Mrs. David Dickson

Mr. Gerald and Mrs. Janet Dietz Katie Dillon

Michael E. Dodd Jacob Kyle Donaldson

Mr. Manuel B. and Mrs. Suzanne Donaldson

Dr. David Dow Lee Downing Mr. Howard R. Dudgeon, III Joanne Dudley

Cooper Dukette Mrs. Ashlev Dulski Brian and Trisha Dunahoo

Mr. and Mrs. Malcolm Duncan, Jr. Mr. and Mrs. Carr DuPuy

Dina Dwyer-Owens Mr. Russell and Mrs. Betty Eberley

Carolyn E. Eddleman Mrs. Bronson B.T. Eden Mr. and Mrs. Louis Englander Joseph C. Enzenberger

Mr. Darrell and Mrs. Evelyn Farney

Richard Myron Fassett James Filiatrault Lenora Lee Foster

Anita Frankford Larry and Deeleane Futch

Mr. Richard T. Gage

Mr. Jordan and Mrs. Haley Gandy Gloria A. Gauntt

Dr. Richard L. and Edith H. Gibnev

Mr. Mark Gifford and Mrs. Leigh Romero

Jennifer and Luke Gilliam

Matthew L. Gokingco

Dr. and Mrs. Jackson Griggs

Josie Gutierrez Loryn and Thad Hairston William Ray Haliburton

Mr. and Mrs. Jim Haller Mr. Clarence and Mrs. Joyce Ham

Kelsey Hamman Jack M. Harbour Mr. and Mrs. Harry I. Harelik

Mr. and Mrs. Dana R. Hassell Tim and Nina Heberling

Patricia Helona Mr. and Mrs. Matt Helton Mr. and Mrs. Taylor Hobbs Joan Y. Hoffman

Jon B. Holloway Nancy and David W. Holmes Anna and Joe Holston

John Householder Mr. Robert M. Howerton Jeff Hull Mr Monte R Hulse Etta Tharp Ibarra

Rit Jacinto Jim Jackson Tim Jaska Mr. and Mrs. Larry D. Jaynes

Kelly H. Johnson Ms. Sherryl R. Johnson Prince A. Jones Barbara Junek Mrs. Pat Kaiser

Scott Kapczynski Mrs. Sandra and Mr. Charles Katz Mr. and Mrs. Herman E. Kelly

Gary Ketterman Mrs. Earline R. Keys Sheri Killingsworth Linda Kilpatrick David A. Kimball Donald Kirby

Ms. Lynn W. Klatt Mr. Mike and Mrs. Janette Knox

Courtney Kolar Mr. Gene and Mrs. Dianne Krempin

Susan Gerken Kruse Mr. and Mrs. David Lacy

Mr. Paul and Mrs. Linda Lam

Melinda Landon Randy and Nita Lanier Heather Lawrence Brian A. Lentz Oscar Lewis, Jr. Melanie Lillard David Lindeman

Mr. Fred and Mrs. Sandra Lindquist Mr. and Mrs. Vernon Lockridge

Juan Lopez Lisa Lopez Mr. Robert Lopez Victor Manuel Lopez Douglas Lorenz

Judy D. Lowe Mr. Dennis and Mrs. Gina Luedeker

Jose Antonio Luevanos Eric Lupfer

Ms. Sandra D. Maddox Mr. Bernard and Mrs. Molly Marcuis Mr. and Mrs. Gary Martel

Carl and Lou Anne Martin

Stephanie Schoot

Mr. Friedrich and Mrs. Patricia Matthies

Shanna Mattson Stephanie Matus Mrs. Beth Mavfield Willis McBride Mr. Ross McCollum

Mr. Bill McGovern Janis H. McIntosh Michael and Susan McKinney

Mr. Joseph and Mrs. Nancy McKinney Joe Tom McMahon

Kathy Ann McMillan Janet McPherson Mr. and Mrs. Andy McSwain Jeremy Mueller Meagan Janice Penn Mercer

Elizabeth Mitchell Mr. Michael Dean Moore Edwin B. Morrison Wendy Leigh Morrow

Juliana Mudd Patrick Stephen Murphy

Steve Myra Roy and Jane Nash Sheila B. Necessarv Mr. Gerald D. Nelson David Norwood Mr. and Mrs. Pat Nowotny

Eddie Odom Mr. and Mrs. George W. Ohlendorf

Luis and Lorena Ortiz Mr. and Mrs. E.L. Page Elizabeth Diane Palacios

Kristi Parrish Gary G. Pate

Mr. Roger H. and Mrs. Sandra L. Patek Janie Duncan Paul

Mr. and Mrs. James Peevey Vicki E. Perley

James Perry Mr. Arthur Pertile and Ms. Renita D. King

Jordan Petter Drs. William and Ruth Pitts

Shirley Proctor Jimmy and Dola Ramirez Mr. and Mrs. Weldon Ratliff, Jr.

Linda Ray Robert Reaves Michael Revnolds Ms. Jennifer A. Richie Mrs. Elma Richmond

Marian Riegel Jana Bland and Kevin Rivera Mr. and Mrs. Korbett Roberts Mr. and Mrs. Clifton Robinson Mr. and Mrs. Robbie Roe

Darla K. Rogers

Mr. Richard and Mrs. Jean Roland Lauren Rouwet

Marianna Duncan Rufus Mikelon Joshua Rutherford Mr. Wilfred and Mrs. Daythene Schaeper

Robin Scheafnocker Mr. and Mrs. John Schlemmer Mr. and Mrs. Adrian Schmidhauser Mr. and Mrs. Martin Schwartz

Nathan and Julie Self Joe Shaughnessy Rick and Lisa Sheldon

Jim Shepelwich Jonathan Scott Sherman Mr. Jerry and Mrs. Marsha Sherrard

Steve and Judy Siegel

Mr. William and Mrs. Doris Smith, Jr. Dorothy Rehm Smith

Mr. and Mrs. Stuart Smith Drs. Ned and Dot Snyder Kathy Sommerkamp

Mrs. Alice Starr Alec Steele Mr. Berton Frederick Stengel

David Randall Stepp Linda Stewart Mr. Paul and Mrs. Billie Stigliano

Ms. Sara Stone Robin Strating

Dr. and Mrs. Artie W. Sudan Angela Sustaita-Ruiz

Carol Sue Sutton Mr. and Mrs. J. Heyward Taylor

Mr. Robert and Mrs. Dena Taylor Mr. and Mrs. Jim Therrell

Faye Thomas Daniel Thun

Mr. and Mrs. Glen Thurman Harry and Dorothy Tolson

Lavelle Topaloff Adriana Torres Susan Townsend

Joe Tracy Mr. Jerrold and Mrs. Laura Trim

Mr. Tim and Mrs. Marla Truitt Jon Trusty Carolyn Hulme Turner Jose L. Valverde

Ms. Sherri Vann Vanessa Vargas Jeanette Vasek

Mrs. Kimberly D. Vicha and John R. Vicha, Jr.

Sherri L. Watson Dr. Charles W. Weathers Linda F. Weaver Thomas R. Webb

Jan Wengler Mr. and Mrs. Bill Wheeless, Jr. Rebecca Elizabeth Whitacre Robert and Jeannine White

Cathy Williams Kenneth Williams Ms. Laura Williams Ms. Margarett Williamson

Janice Wilson Sally W. Wolfe Jane Wood

Ms. Mary Jane Wood Mr. Mike and Mrs. Trudy Woodson

Mary Ellen Word Irene Wright Josh Young Judy Ziegler

ORGANIZATIONS —

Allen Samuels Chrysler, Dodge, Jeep, Ram Alliance Bank Central Texas

Amarillo Area Foundation, Inc. AmazonSmile Foundation

American Online Giving Foundation, Inc. Ascension Providence

Bidwell Family Foundation at Fidelity Charitable Gift Funds Bill & Melinda Gates Foundation

Bob and Mary Baltimore Charitable Fund at Fidelity Charitable

Budd Family Foundation Buena Vista Foundation

Carl B. and Florence E. King Foundation

Carl C. Anderson Sr. and Marie Jo Anderson Charitable Foundation Rainbow International Restoration

Christian Women's Job Corps of McLennan County

Community Foundation of Abilene

Energy Foundation

First Title Company of Waco, LLC

Five Star Painting of Federal Way and Tacoma

H & B Packing Co., Inc. H-F-B

Hemisphere Aerospace Investments Hogg Foundation for Mental Health

Impact Research Institute Insurors of Texas General Agency, Ltd.

Jaynes, Reitmeier, Boyd & Therrell, P.C.

Kiwanis Club of Waco Seniors KPMG Gives c/o Bergen County's United Way

Methodist Healthcare Ministries of South Texas, Inc.

Moody Cemetery Association Moody Community Library, Inc.

Moody Independent School District

Mr. Electric of Clark County

Pakis, Giotes, Page & Burleson, P.C.

Pattillo, Brown & Hill Permian Basin Area Foundation

Prentice Farrar Brown and Alline Ford Foundation Print Source

R.E. Henderson and Co., Inc. Real Property Management Apex

rootED Alliance Rotary Club of Waco Sally's Maid Service

San Angelo Area Foundation Sartain Consulting Shield-Ayres Foundation

Texas Farm Bureau Casualty Insurance Company

Texoma Health Foundation The Bernard and Audre Rapoport Foundation

The Blackbaud Giving Fund

The Cynthia and George Mitchell Foundation

The University of Texas at Austin

Torrance Memorial Trust

University Kia

Westdale Asset Management, Ltd.

FUNDS MANAGED

BY WACO FOUNDATION

DONOR ADVISED FUNDS

4 Sons Trucking Charitable Fund Adam Blake Therrell Addiction Recovery Fund Adrian & Carol Schmidhauser Fund Alford Family Fund Ambassador & Mrs. Lyndon L. Olson, Jr. Fund Andrew & Sarah Pick Fund Ann & Roane Lacy, Jr. Family Fund Anna-Louise & Nick Deaver Family Fund Ashley Allison & David Dulski Fund Battle Family Fund Betsy & Phil Reeder Fund Bill & Barbara Vance Fund Bill & Shirley Williams Family Fund Brian & Melissa Bivona Fund Burchfield Family Fund Carolyn Collins Ostrom & Eric Ostrom Fund Carrie Kuehl Fund Clifton Foundation Fund Craig Williams Fund Diane G. Cox Fund Dickson Family Fund Dossett Family Fund Edward Lee Humphreys IV Fund Ellender Chase Fund for Children Englander dZignPak's 50 Weeks of Giving Fund Englander Family Fund Eric A. Schmidhauser Fund Frances Callan Fund Frank & Eleanor Levy Fund Gerald & Jamie Villarrial Family Fund Grant & Donell Teaff Fund Harelik Family Fund Harr Family Foundation Heyward & Brooke Taylor Family Fund Holy Ship Giving Fund Insurors of Texas Fund Jack & Nancy Munson Fund Jennifer Richie Fund Joe E. Baxter, Sr. & Bessie Dunkle Baxter Fund

Joshua & Elizabeth Connor Charitable Fund JSJH Fund Judy & David Guyer Fund Kenneth W. & Alice M. Starr Fund Lake Shore Baptist Hansma Peace Fund LaRaine & Carr DuPuy Fund Lisa & Larry Jaynes Fund Manuel Sustaita Memorial Fund Mark Hobbs Fund Mayfield Family Fund McSwain Family Fund Mike & Joy Bidwell HOT Fund Monte R. Hulse Family Fund Moss Family Fund Mr. & Mrs. Bronson B.T. Eden Fund Nancy & Woody Callan Fund Neil & Rita Gibson Fund Nell & Jim Hawkins Fund Our Lady's Foundation Fund Paul & Ann McCoy Fund Pitts Family Fund Rachel & Taylor Hobbs Fund Raymond Family Fund RET-KAT Foundation Fund Robinson Family Fund Rondy & Jackie Gray Fund Ross & Nelwyn Reagan Fund Sam & Sharon Allison Family Fund Susan & Malcolm Duncan Fund Swann Family Fund Texas Rural Funders Donor Advised Fund Tom & Helen Chase Fund TS Kelly Giving Fund W. Lacy Clifton Fund Walter & Martha Allison Fund Whitaker Family Fund Wilbern & Francis Kienitz Foundation Fund

John & Ellen Derrick Fund

UNRESTRICTED FUNDS

J. Carroll & Doris W. Wood Fund John F. Horsfull, Jr. Fund Louis & Rosa Conti Fund Lucy & Kent Keeth Fund for Waco

Lyle Seley Masterson & Lyle Kay Masterson Fund WF Assets, Inc. William Travis Clarke, Jr. Fund for Waco

SCHOLARSHIP FUNDS

A.J. Moore High School Alumni Association Scholarship Fund A.J. Moore High School Class of 1966 Legacy Scholarship Fund Academic All Stars Award Fund

AREA Scholarship Fund

Arzo S. Burnim. Ruby Burnim & Mary Etta Williams Scholarship Fund

Bradley Billington Scholarship Fund

Caroline E. & Emanuel M. Corwin Tennis Scholarship Fund

Dorothy L. & James L. Davis Memorial Scholarship for Mart ISD Fund

Duncan Scholars Emergency Fund

Duncan Scholars Fund

Duncan Scholars Scholarship Fund E.A. & Martha H. Bernhausen Fund

Grant Teaff Character Scholarship Fund

Greater Zion Missionary Baptist Church Clarence & Velma Simmons Academic

Scholarship Fund

James W. Odom Memorial Scholarship Fund Judy Patrick Memorial MAC Scholarship Fund

Kiwanis Club of Waco Seniors Scholarship Fund

MAC - Waco High Class of 1950 Scholarship Fund

MAC College Money Program - MAC Scholarships Madlyn Bertram Class of 1944 Scholarship Fund

Mike & Jov Bidwell Fund for Duncan Scholars

Moody Scholarship Fund

Nancy Sides Munson Scholarship Fund for Abbott High School

Nick Sheldon Legacy Scholarship Fund

Pakis Family Fund for MAC Scholarships

Passion & Purpose Higher Education Scholarship Fund

Passport to Success General Fund

Passport to Success Scholarship Fund

Proyecto Adelante - Dr. George Villa, Sonny Juarez & Gerald Villarrial Scholarship Fund Randy Leasley Scholarship Fund

Rick Bradfield Award for Breaking News & Investigative Journalism Fund Robbie Stabeno MAC Scholarship Fund

Roderick "Chip" Brownlow Memorial Scholarship Fund

Rotary Club of Waco Scholarship Fund Salome Family Fund for Duncan Scholars

Sam & Donna McClendon Education Scholarship Fund

Soldiers of the Wooden Cross Scholarship Fund

Theta Pearl Scholarship Fund

YMCA Summer Camp Scholarship Endowment Fund

FIELD OF INTEREST FUNDS

Beautification Fund

Bill Pakis & Artie Giotes Fund for Economic Development

Center for Learning and Development Fund

Communications Co-op Fund

Dr. George Jurek Dental Service Fund

Eleanor Lou Collins Fund for Historic Preservation

Fund for Women

Jerry & Barbara Burks Fund for Children

Jerry & Patsy Cartwright Family Fund

LaRaine & Carr DuPuy Quality Childcare Fund

Lou & Tom Collins Fund For Early Childhood Development

McLennan County Medical Society Fund

The McLennan County Cardio-Pulmonary Foundation - Crosthwait Education Fund

Waco Performing Arts Fund

AGENCY FUNDS

Advocacy Center for Crime Victims & Children Fund

Advocacy Center Reserve Fund

Alzheimer's Association - North Central Texas Chapter Fund

Animal Birth Control Clinic Building Endowment Fund Animal Birth Control Clinic SNIP Endowment Fund

Art Center Waco Fund

Big Brothers Big Sisters of Waco Fund

Bosqueville Methodist Church Trust Fund

Boys & Girls Clubs of Waco Fund

Branding the Brazos - Doris Miller Statue Fund

Cameron Park Zoological & Botanical Society Fund

Care Net Pregnancy Center of Central Texas Endowment Fund Caritas - Esther & Eugene Jud Endowment Fund

Cen-Tex Hispanic Chamber Foundation Fund

Christian Women's Job Corps of McLennan County Fund

Coach Mike Chapman Foundation Fund

Communities In Schools of the Heart of Texas Fund

Community Cancer Association Endowment Fund

Community Race Relations Coalition Endowment Fund

Compassion Ministries Endowment Fund

Dorothy Crippen Hurd Scholarship Fund

Dr Pepper Museum & Free Enterprise Institute Endowment Fund

Dr. Brian Aynesworth Memorial Library Fund

El Calvario Church Building the Future Fund Family Abuse Center Endowment Fund

Family Health Center Dental Care Fund

Family Health Center Fund

Fuzzy Friends Rescue Endowment Fund

Girl Scouts - Bluebonnet Council, Inc. Endowment Fund

Greater Waco Sports Commission Fund

Heart of Texas Honor Flight Fund

Hispanic Leaders' Network Reserve Fund Humane Society of Central Texas Fund

Inspiración Fund

Junior League of Waco Clifton House Fund

Junior League of Waco Community Projects Fund

Junior League of Waco Reserve Fund

Kathryn Ann "Kitty" Hawk Tunmire Family Abuse Center Endowment Fund Lake Shore Baptist Endowment Fund

May Woo Wang, MD Family Medicine Residency Endowment Fund MCC Permanently Endowed Fund

McLennan County Library Endowment Fund

Meals on Wheels (Central Texas Senior Ministry)

Meals on Wheels Reserve Fund

Ministry & Missions Endowment Fund of the Waco Regional Baptist Assoc. Mission Waco Endowment Fund

Moody Cemetery Endowment Fund

Moody Community Library Capital Projects Fund

National Alliance on Mental Illness (NAMI) Waco Reserve Fund NeighborWorks Waco Fund

NeighborWorks Waco Reserve Fund

Oakwood Cemetery Historic Preservation Foundation Fund

Patt Laidler Memorial Foundation, Inc. Endowment Fund

Planned Parenthood of Central Texas Endowment Fund Salvation Army of McLennan County Reserve Fund

Save the Texas Fund Solide, Inc. Fund

Start Up Waco Fund for Entrepreneurship

Talitha Koum Institute Endowment Fund

The Arc of McLennan County Endowment Fund

The Freeman Center Fund

The TSTC Foundation Scholarship Endowment Fund

Unbound Global Reserve Fund

United Way of Waco-McLennan County Unrestricted General Fund

Vanguard Building Maintenance Endowment Fund

Vanguard College Preparatory School Reserve Fund

Vanguard Foundation Endowment Fund

Waco City Council PTAs Endowment Fund

Waco Civic Theatre Fund

Waco Downtown Farmers Market Reserve Fund

Waco Family Y Fund

Waco Habitat for Humanity Endowment Fund

Waco ISD Education Foundation Endowment Fund

Waco Montessori School Endowment Fund

Waco Regional Baptist Association Reserve Fund Waco Symphony Association Fund

Waco Symphony Council Conductor's Chair Fund

Waco Symphony Martha G. Beard Concertmaster Chair Fund

Waco Symphony Youth Orchestra Scholarship Fund

Waco-McLennan County Library Margin of Excellence Fund

William Travis Clarke, Jr. Endowment Fund for Meals on Wheels

Woodway Foundation Endowment Fund

YMCA Dr. Mae Jackson Memorial Scholarship Fund

DESIGNATED FUNDS

Annie Hattie Turner Fund

Bob & Alice McKinney Public Library Fund Brownfield Fund for East Terrace House

Campfire USA, Tejas Council - Pat & Goodson McKee Endowment Fund

Community Health Worker Fund

David & Lorraine B. Hoppenstein Fund

Dewey & Betty Shannon Fund

Dr. George Jurek Charitable Fund

Duncan Fund (Historic Waco Foundation)

Historic Waco Foundation Fund

J.L. Davis Mart Road Project Fund

Malcolm & Mary Ruth Duncan Dental Care Fund Mark & Esther Wolf Charitable Fund

McLennan County Peace Officers Memorial Fund

Melanie Popejoy Girls' Choir Fund Nonprofit Institute Fund

Rodnev & Nan Brown Family Fund

Rodney & Nan Brown Family Fund (Seventh & James Baptist Church) Rodney & Nan Brown Family Fund for Alzheimer's Research

Texas Census 2030

Texas Rural Funders Administrative Fund

OPERATING FUNDS

Duncan Scholars Operating Fund Waco Foundation Mission Fund Waco Foundation Special Fund

Waco Foundation Unrestricted Fund

Willie B. & Gloria DuBose Fund

HONORING

MIKE BIDWELL

Waco Foundation mourns the loss of beloved Trustee, Mike Bidwell. Mike joined Waco Foundation's Board in 2021 and served as a generous and committed member who cared deeply for the community. His leadership and guidance will be deeply missed by the Board, staff, and all those who had the opportunity to know him. Waco Foundation will be forever grateful to Mike for his unwavering dedication to improving the lives of Wacoans. Please join us in sending Mike's family thoughts of comfort and peace during this very difficult time.

WACO FOUNDATION PAYS TRIBUTE TO ONE OF OUR MOST BELOVED PHILANTHROPISTS, MIKE BIDWELL.



BUT THIS IS OUR FOREVER HOME!

Waco Foundation is pleased to announce we are the new owners of the former First Federal Savings and Loan building located at 1224 Austin Avenue. This is an exciting move for the Foundation because the building has enough space to eventually house a collaborative environment for nonprofits to office, host events and meetings, and serve as a charitable resource hub for Waco. Thanks to generous donors who continue to give to offset the cost of this historic building, owning the space will be more economical than leasing longterm. That means more funds available for the vital work local nonprofits provide in the community.

NEW ADDRESS:

1224 Austin Ave. | Suite 100 Waco, TX 76701

WACOFOUNDATION.ORG • 254.754.3404





FOR WAGO.