At Greater Houston Community Foundation, we are grateful for the continuous and unwavering support of the many donors and collaborative partners who give to, through, and with the Foundation in order to create impact in our community. By partnering together, we have the unique ability to help others, change lives, and effect positive change for generations to come.

In 2021, we focused on expanding our role as a community leader, serving as a critical philanthropic partner and resource for our region, while also continuing to support donors through effective, customized solutions in order to generate the greatest charitable impact. February brought an important collaboration with United Way of Greater Houston to oversee and administer the Winter Storm Relief Fund, established by the City of Houston and Harris County, to help those in greatest need following the unexpected Winter Storm Uri.

Later in the spring, we partnered with Episcopal Health Foundation, Methodist Healthcare Ministries of South Texas, Inc., and The Meadows Foundation to administer the Your Shot Texas Fund, helping raise awareness and accessibility around COVID-19 vaccinations for vulnerable populations.

Through the fall, we continued to build new relationships with donors looking to have an impact in Houston. By year-end, over $174 million in grants had been distributed throughout the region and beyond, bringing our total grant distribution over the past 26 years to more than $1.8 billion.

With an eye on the horizon, we continue to look at new and innovative ways to improve our processes in order to better serve donors and the community at large. We are excited to launch some of these new initiatives in the coming year, including a new website and additional educational programming to make it easier than ever for individuals, companies, and families to engage in philanthropy.

The power of stories cannot be overstated, and that’s why we’ve chosen it as the theme of this year’s annual report. They not only serve to preserve important lessons of the past, but also to inform and inspire action in the present and future. They are critical to the sharing of the values that fuel change for the better, and our hope is that by sharing a few stories from our donors and partners in this report, we can help encourage others to begin crafting their own stories of giving.

On behalf of everyone at Greater Houston Community Foundation, thank you for another year of making a difference in our community and for making us a part of your story. Together, we are one community.

Sincerely,

Ron Hulme
Governing Board Chair, 2020-2021

Stephen D. Maislin
President & CEO
Celebrating Houston-Based Grant Recipients Including:

$1,500,000+
Memorial Park Conservancy
Rice University
United Way of Greater Houston

$1,000,000 – $1,499,999
Baylor College of Medicine
Center for Pursuit
First Baptist Church of Houston
HAY Center Foundation
Houston Museum of Natural Science
Houston Methodist
The Salvation Army
Wonderland Educational Estate Association

$500,000 – $999,999
Alley Theatre
College of Biblical Studies - Houston
Evelyn Rubenstein Jewish Community Center of Houston
Houston Ballet Foundation
Houston Center for Contemporary Craft
Houston Food Bank
Houston Grand Opera Association
Houston Parks Board
Houston Symphony Society
Memorial Hermann Foundation
Star of Hope Mission
Texas Children’s Hospital
The Museum of Fine Arts, Houston
University of Houston

Grants by Program Area
(1/1/2021 – 12/31/2021)

<table>
<thead>
<tr>
<th>Program Area</th>
<th>Percentage</th>
<th>Amount (Million $)</th>
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Total Assets
$1,359,846,722

Total Gross Gifts
$571,521,160

Total Gross Grants
$174,301,783

Assets, Gifts, and Grants
FINANCIAL PROJECTIONS AS OF JANUARY 31, 2022
Supporting the Human Spirit

Tech innovator Anthony Wood and wife Susan working in collaboration with their philanthropy director Nancy Chan and Greater Houston Community Foundation

Anthony Wood, Founder, Chairman, and CEO of Roku, Inc., and his wife Susan established the Wood Next Fund at Greater Houston Community Foundation to support initiatives in the Greater Houston region, the south, and beyond. We asked Anthony and Susan about their story of giving and what inspires their philanthropy. Nancy Chan, Director of Philanthropy for Wood Next, shared additional insight.

“Our giving is guided by our overall mission to remove obstacles to fulfilling lives; advance human progress; and support the human spirit.”

ANTHONY WOOD

Q: What are your ties to Houston?
Susan Wood: We both grew up in Houston and met at Texas A&M. I came from the Heights and Anthony from Alief. I’m a third generation Houstonian and a fourth generation Texan — in fact, my third great-grandfather served in the Texas army and fought at the Battle of San Jacinto, and my fourth great-grandfather signed the Texas Declaration of Independence!

Anthony Wood: We loved growing up in Texas, but my career took us to Silicon Valley. We still have deep connections to Texas, and friends and family in the Houston area. We also spend a lot of time in Austin.

Q: What issues or causes are most important to you and your family?
Anthony: Due to our deep ties to Houston, Texas A&M, Texas, and the South more broadly, much of our giving is directed to these regions.

Our philanthropic priorities include mental health and related issues, scientific and biomedical research, economic opportunity and root causes of poverty, Texas A&M, and more. We prefer to work on the root causes of problems. For example, we invest in entrepreneurship support, workforce development, youth mentoring and development, mental health, substance use disorder and homelessness, including wilderness therapy and high school scholarships.

We also fund biomedical and scientific research. For example, we fund research in circadian rhythms (jet lag), Alzheimer’s, dementia, cancer, and the causes of ice ages (interglacial warming and cooling). In Houston, Austin, Dallas, and statewide, we’ve helped to fund 2021 winter storm recovery efforts. In 2017, we also supported Hurricane Harvey relief efforts through the Rebuild Texas Fund.

We’ve invested in some risky startups as well, including two fusion energy companies.

Q: What are some of the organizations or areas you are funding in Houston?

Nancy Chan: In Houston, the Wood Next Fund has supported the Coalition for the Homeless of Houston/Harris County and Harmony House. At Texas A&M, the Woods have supported its COVID-19 Disaster Relief Fund, the Mays Innovation Research Center, the Cushing Memorial Library & Archives Endowment, the Hagler Institute for Advanced Studies, and the School of Innovation, along with many other initiatives.

Q: Why partner with Greater Houston Community Foundation in your philanthropy?

Nancy: Greater Houston Community Foundation’s deep knowledge of and ties within the Houston community, paired with its high-quality, responsive professional services to support not only our grant making but also our impact investments, made them the natural partner for Wood Next Fund’s philanthropy.

Anthony: We’re grateful for their expertise, warmth, and readiness to help us make a meaningful impact on the lives of Houstonians and Texans alike.

Susan and Anthony Wood met while attending Texas A&M University. He studied electrical engineering while she studied environmental design.
Ron and Sheila Hulme call Houston home, and through their community leadership, have helped to elevate philanthropic impact around the region. Ron has been a distinguished investor, executive, and advisor in the energy industry over the past 40 years. In the past decade, he has served as the CEO of two energy focused private equity firms, as the Co-Founder of an energy Fin Tech platform, and as the CEO of a multi-strategy hedge fund. Previously, he spent 26 years at McKinsey & Company.

In addition to his leadership on the Governing Board of Greater Houston Community Foundation, Ron serves as an active board member and previous Chair of Texas Children’s Hospital Board of Trustees and the Alley Theatre. Through the years, Sheila has been involved as a volunteer with Junior League of Houston, Houston Symphony, Houston Zoo, the Salvation Army Women’s Auxiliary, and the Hulme’s church, First Presbyterian Church, Houston.

The Hulmes first got involved with Greater Houston Community Foundation nearly a decade ago when they created the Ron and Sheila Hulme Foundation. The Hulme’s trusted advisor, Barry Margolis, suggested they consider partnering with the Foundation in their philanthropy. One of the reasons they chose to partner with the community foundation was the ability for Greater Houston Community Foundation to leverage complex assets, like real estate, to help fund their philanthropy.

“Greater Houston Community Foundation embodies the power of one community and of people coming together for greater good. Through collaborative work with donors, and partnerships with nonprofit and corporate leaders, together, we are creating a lasting impact in our community.”

RON HULME, GOVERNING BOARD CHAIR

Q: What are your ties to Houston?
Ron Hulme: I grew up in Oklahoma but got here as soon as I could after going to school at the University of Texas at Austin. I’ve been a Houstonian ever since.
Sheila Hulme: I was born in Pennsylvania, but moved here when I was six years old, so I’m practically a native Houstonian! We raised our three daughters here and are proud to call it home.

Q: What do you love about Houston?
Ron: Houston is, I think, a fabulous community where people feel an identity. When you identify as a Houstonian, you’re proud of it.
Sheila: It’s a warm and welcoming city. People that come here are just amazed at how open Houstonians are. We are a diverse community that’s rich with different groups of people, brought together by this common feeling of togetherness and unity. We’re also a very philanthropic city, which is something we have learned about from the Foundation. We get to see it firsthand.

Q: What inspires your philanthropy?
Sheila: There’s a lot that goes into our passion to give back — we raised our family in this community and our love for Houston has only grown with time. Our giving has followed our volunteering. Participation and involvement on a personal level with organizations we know are making powerful impacts in the community is core to our philanthropy.

Q: How have you worked to pass on your philanthropic values within your own family?
Ron: We believe that time and talent are priceless gifts one can give, especially when it’s such a busy time for everyone. I hope that we role modeled that element clearly for our kids. That’s probably the most important step for our family and carrying that forward.

Learning the importance of building a legacy... it’s a terrific opportunity for families to pass on the education of giving. Greater Houston Community Foundation provides value by helping families at any stage learn to start important conversations around philanthropy. The Foundation helps donors manage their unique opportunity to make an impact in our community.

Q: What role does the Foundation play in our community’s philanthropic landscape?
Ron: We believe respect and gratitude are important parts of the ecosystem for making things work in Houston. There are so many good local causes to learn about — far too many for any one person to keep track of and really understand. But, Greater Houston Community Foundation helps you give in a strategic and targeted way.
A lot of people might look at it and say, “Well, why do I need a community foundation?” But the expertise and familiarity with Houston’s philanthropic ecosystem helps — it helps tremendously.
“Community leadership goes beyond having a consistent presence in our city. It means being strategic and thoughtful about how to make the greatest possible positive impact on the lives of our neighbors utilizing all of the resources available to us. I’m proud to see the Greater Houston Community Foundation continue to lead in this critical role.”

NANCY MCGREGOR
GOVERNING BOARD MEMBER

Philanthropic Impact Committee

CHAIR: NANCY MCGREGOR
TONY CHASE
CULLEN GEISELMAN
LISA HALL
RON HULME
LAURA JARAMILLO
JENNIFER LAPORTE
ROXANN NEUMANN
CAREN SWEETLAND
TYM TOMBAR
RANNA WEINER
KYLE WRIGHT

COMMUNITY LEADERSHIP

DISASTER RESPONSE AND RECOVERY

Greater Houston Community Foundation has continued to demonstrate leadership for our region, serving as a critical partner in disaster-response efforts. We stand ready as a resource for individuals, families, and businesses to address emergency needs after a disaster.

Our experience with disaster-relief funds makes it possible to establish a fund quickly and efficiently. We partner with businesses looking to provide financial assistance to employees who have suffered damage from federally declared disasters by establishing eligibility requirements, managing grant applications, and processing and distributing grant payments in accordance with IRS guidelines.

In February 2021, we announced an important ongoing partnership with United Way of Greater Houston in order to coordinate response and recovery efforts after future disasters. This partnership will utilize established systems and processes to activate and fundraise quickly in the aftermath of a disaster when a swift response is critical. The partnership will benefit from our collective deep-rooted relationships within the philanthropic community, including corporations, foundations, and individuals who recognize the importance of a collaborative disaster-recovery approach.

GREATER HOUSTON COVID-19 RECOVERY FUND

In March 2020, Greater Houston Community Foundation and United Way of Greater Houston established the Greater Houston COVID-19 Recovery Fund to ensure the most vulnerable in our community affected by COVID-19 have access to food, health care, shelter, and other basic necessities.

The Fund set out to make the greatest impact with the philanthropic dollars entrusted to us. It was clear that no one fund or organization could answer needs of this magnitude, and that it would take the joint efforts of the public and private sectors working together. The Fund received donations of all sizes from foundations, individuals, and companies, and we thank everyone who answered this urgent call for help in our community.

We would like to offer special thanks to Houston Endowment for their lead gift of $1 million and a challenge gift of $1 million that added $1 for every $4 raised, resulting in an additional $5 million. This generosity enabled the Fund to invest $18.4 million in 87 nonprofit partners that were able to serve more than 209,802 individuals living in 100,578 households located in Fort Bend, Harris, Montgomery, and Waller counties. To learn more, read the final report at www.greaterhoustonrecovery.org.

$1,000,000+
Houston Endowment
Arnold Ventures
The Brown Foundation
Phillips 66
The Ting Tsung and Wei Fong Chao Foundation & Westlake Chemical Corporation
Anonymous

$500,000 – $999,999
Randa and K.C. Weiner
Mr. Charles Butt
Huffington Foundation
The Powell Foundation

(Left) Amanda McMillian, President & CEO, United Way of Greater Houston (right) Steve Maislin, President & CEO, Greater Houston Community Foundation
HOUSTON HARRIS COUNTY WINTER STORM RELIEF FUND

Recognizing the dire hardships created by extreme winter weather in February 2021, Houston Mayor Sylvester Turner and Harris County Judge Lina Hidalgo established the Houston Harris County Winter Storm Relief Fund to help our region’s most vulnerable neighbors during a critical time of need. To support these efforts, Greater Houston Community Foundation and United Way of Greater Houston were enlisted to oversee and administer the grant distribution process.

With a fundraising-focused advisory board led by David Lesar, CenterPoint Energy President and CEO, the Fund raised $17 million with the support of generous companies, foundations, and individuals. Through its nonprofit partners, the Fund has served 19,820 individuals living in 5,888 households through emergency financial assistance and repaired more than 1,000 homes to help families recover from burst water pipes and freeze damage.

To learn more, visit www.winterstormrelieffund.org.

YOUR SHOT TEXAS: TEXAS EQUITABLE VACCINE UPTAKE

Your Shot Texas is philanthropy’s collaborative response to raise confidence in COVID-19 vaccines and increase access among those most affected by the virus and historically marginalized populations across the state. The $3.7 million Fund was created by Episcopal Health Foundation, Methodist Healthcare Ministries of South Texas, Inc., and The Meadows Foundation, along with philanthropic organizations across the state.

The Your Shot Texas Fund, administered by Greater Houston Community Foundation, provides grant dollars to community-based and grassroots organizations with existing relationships with priority populations, including people of color and under-resourced rural and urban communities. The Fund aims to support outreach efforts and activities that offer a promising approach to increasing vaccine confidence and uptake for those who may not otherwise qualify for public resources.

More at www.episcopalhealth.org/your-shot-texas.

$500,000+
Episcopal Health Foundation
Houston Endowment
Methodist Healthcare Ministries

$100,000 – $499,999
Arnold Ventures
Ben and Maytee Fisch Foundation
The Cullen Foundation
The Cullen Trust for Health Care
Hogg Foundation for Mental Health
Lyda Hill Philanthropies
The Meadows Foundation
Robert Wood Johnson Foundation
St. David’s Foundation

ALMAAH: ADVOCATES OF A LATINO MUSEUM OF CULTURAL AND VISUAL ARTS & ARCHIVE COMPLEX IN HOUSTON, HARRIS COUNTY

GOAL: Ensure the equitable, authentic representation and access to the diverse Latino culture and communities of Greater Houston.

ALMAAH is committed to unite behind a Latino Museum of Cultural & Visual Arts and Archive Complex that will become a destination and engine of economic growth. The complex would support Latino culture and visual arts by creating opportunities to grow locally and nationally as well as helping to elevate Houston as a national hub of Latino culture.

To learn more, visit www.almaahh.org.

HOUSTON SOCIAL JUSTICE AND ECONOMIC EQUITY FUND

GOAL: To enact transformational change through the investment of resources in organizations and initiatives that empower and uplift the Black community.

Guided by dedicated business, civic, and sector thought leaders in our community, the Fund is committed to taking actions that encourage equitable systems change.

Houston Social Justice and Economic Equity Fund’s back office and grant administration is initially operated by Greater Houston Community Foundation with oversight from an Executive Board of Directors, with the ultimate goal of becoming its own 501(c)3 nonprofit organization.

To learn more, visit www.houstonequityfund.com.
When we began work on Understanding Houston a few years ago, we set out to create a relevant, accessible platform that would connect community leaders and changemakers with the information they need to take targeted, informed action where our region needs it most. This year, Understanding Houston celebrated the two-year anniversary of our launch in 2019. Since then, we have grown significantly, and we would like to thank everyone who has supported our mission to build a more vibrant Houston with opportunity for all. Here are just a few of the things that made year two such a success.

THE ADDITION OF OUR NINTH TOPIC: DISASTERS
Between hurricanes, floods, and even freezes, residents in Houston’s three-county region are no strangers to weather-related disasters. Layer on the COVID-19 pandemic and its many devastating impacts, and the need for a source to find data on regional disasters was greater than ever. The Disaster topic page allows us to take an in-depth look into our region’s disaster risks and identify opportunities and obstacles to help our residents prepare for and withstand the various impacts of disasters.

ENGAGING THE COMMUNITY
Above all, Understanding Houston is a collaborative initiative. We engaged hundreds of stakeholders in the creation of the site, briefed hundreds upon our launch, and seek feedback to continuously improve. Despite COVID-19 restrictions in 2021, we were able to brief more than 700 community members, government officials, nonprofit practitioners, donors, and other stakeholders on the new Disaster data, launched our newest program called Data Dives + Workshops, and facilitated our first Visioning Lab as we seek input on what the next phase of Understanding Houston should look like. We also launched our inaugural annual survey in which 90% of respondents reported high satisfaction with the website, 93% of individuals who attended a data briefing had increased understanding of the region, and 83% reported taking action after learning from and using Understanding Houston.

AMPLIFYING COMMUNITY VOICES
At its core, Understanding Houston aims to inspire and inform action — not only by providing robust data over time on key quality-of-life indicators but also by illuminating and contextualizing that data into insights through research articles and amplifying Community Voices with regional leader profiles and personal stories. In 2021, we produced over 20 articles on the Community Voices blog, including collaborating with a number of community leaders and organizations including the Houston Education Research Consortium (HERC), Arts Connect Houston, Urban Harvest, FuelEd, and many more!

"As a concerned Houstonian, the resources available through this initiative have a direct impact on where and how I can direct my resources to have the most impact in my own city."

SHEILA THORNE, GARDENKIDS OF KEMAH

"As a concerned Houstonian, the resources available through this initiative have a direct impact on where and how I can direct my resources to have the most impact in my own city."

GREATER HOUSTON COMMUNITY FOUNDATION DONOR

Understanding Houston Donors 2019 – 2021

$500,000+
JPMorgan Chase & Co.

$250,000 – $499,999
Polly & Murry Bowden

$100,000 – $249,999
Bill & Sandy Bryan

$50,000 – $99,999
Krista & Mike Dumas

$25,000 – $49,999
Terri & Greg Ebel

10,000 – $24,999
Episcopal Health Foundation

$500,000+
Lacey & Matt Goossen

$250,000 – $499,999
Gene Graham

$100,000 – $249,999
Sheila & Ron Hulme

$50,000 – $99,999
Mandy & William Kao

$25,000 – $49,999
Alexandra & Dave Pruner

10,000 – $24,999
Kim & David Ruth

Understanding Houston [provides] reliable data to provide a basis for discussion on problems facing Greater Houston. Using this information with others allows us to determine root causes and first steps to developing an action plan to address a basic issue.”

SHEILA THORNE, GARDENKIDS OF KEMAH
The Center for Family Philanthropy (CFP) helps donors amplify their generosity and ensure their legacy through programming for youth, next gen, and families. The CFP mission is to connect, serve, and inspire families in their quest to do personal and impactful giving across the generations.

**Founding Families**

- Leslie & Jack Blanton, Jr. Family
- Fluor Family
- Melanie Gray & Mark Wawro
- Anika Jackson & Family
- Kao Family
- Tellepsen Family
- Vettical Family
- Bonnie & David Weekley
- K.C. & Randa Weiner Family

**The 2021 CFP Advisory Committee**

- **Chris Weekley, Chair**
- Leslie & Jack Blanton, Jr.
- Lacey Goossen
- Mandy Kao
- Jennifer Laporte
- Leslie Margolis
- Caren Sweetland
- Celestine Vettical
- Bonnie Weekley
- Randa Weiner

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**FAMILY GIVING CIRCLE**

**New Horizons for Community Impact: Youth Leadership at Greater Houston Community Foundation with Isabelle Pesikoff**

Empowering and educating the philanthropic leaders of tomorrow starts with engaging younger generations today. Isabelle Pesikoff is a sophomore at St. John’s School and Treasurer for the Youth Leadership Team at Greater Houston Community Foundation. We spoke to her about what she and her peers are learning about philanthropy, volunteerism, and leadership.

To Isabelle, philanthropy is more than monetary contributions. Giving back means getting involved to create the biggest impact possible. “My family is a group of people who share the same passion for helping others,” said Isabelle. “I was raised in a family where the value of tikun olam or ‘repairing the world’ is very prominent.”

In school, Isabelle was given the opportunity to be a community service leader. Last year, she organized supply drives for dogs, collecting toys, blankets, food, and other important resources. This year, she’s focusing on projects to assist the elderly in her community. “I’m working with a friend on how to engage our fellow students at St. John’s, and give them the opportunity to go to Seven Acres Jewish Senior Care Services to spend time with the elderly.”

Youth Leadership Team members learn how the grant cycle works. They work together to select an issue they want to tackle, review grant proposals, discuss and debate the merits of each, and decide which agencies will receive funds. “I’ve come to appreciate how deciding which organization to give money to is really difficult, because there are just so many opportunities in so many great organizations,” commented Isabelle. As Treasurer, Isabelle works with current and past grantees. She is responsible for sending the award announcements to each nonprofit, as well as following up with past grantees to create a summary report of how grant dollars have been utilized.

Isabelle also learned how to have meaningful conversations with other teens around giving and volunteering. “Philanthropy can be a topic that’s hard to connect to sometimes, I think. Being able to have conversations among my peers who have the same passion is a really important skill,” she said. “How to give my input in conversations while also stepping back and encouraging others to join in — I think that skill is really important to have for this passion, but also for other things in life.”

To learn more about the Center of Family Philanthropy and the Youth Leadership Team, reach out to Allison Hale, Senior Philanthropic Associate, at ahale@ghcf.org.

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ISABELLE PESIKOFF
What’s next for the next generation of donors and leaders?

A CONVERSATION WITH LACEY GOOSSEN, KELLY HACKETT, AND CHRIS WEEKLEY

The Next Gen Donor Institute, one of our signature programs, has nearly 140 graduates who serve as leaders on nonprofit boards, family foundations, and businesses across Houston and beyond.

Next Gen Donor Institute alumni Lacey Goossen, Kelly Hackett, and Chris Weekley shared their experiences with us and what they’re looking forward to for the Institute’s future.

Q: How does the Next Gen program develop the next generation of philanthropists? What were some of your biggest takeaways? What do next gen donors want to learn?

Lacey Goossen: When I started, I wanted to learn how to be a proactive giver... to learn how to evaluate organizations, know that my contributions are effective, and make sure I was giving in a strategic way. I have appreciated that the program creates a safe space for engaged next gen donors to share our experiences and learn from one another. I’ve built really great relationships here that are centered around the common value of wanting to be informed and effective leaders in philanthropy.

Kelly Hackett: The program provides education about the business of philanthropy, which I think is critical to successfully supporting the community. Next gen donors want to know how best to support organizations as volunteers, donors, and board members. Learning how to read tax filings, what legal frameworks are available to donors, and how to listen to the needs of community members are vital to impact. The program teaches all of those things in a collaborative environment that lends itself to long-term relationships.

Chris Weekley: The biggest takeaway from my engagement with the next gen programs is my expanded peer network, specifically for philanthropy. I have made meaningful connections with people I would not normally have encountered. My classmates and peers consistently challenge me and open my eyes to different causes, needs, and perspectives. They have helped me become more broadly informed about what is happening across our city, even if I am not personally involved with all of those causes or organizations.

continued on next page
Q: Why are you excited for the upcoming Next Gen evaluation initiative? What do you hope to learn?

Kelly: As is the case with my giving, I am always interested in impact. It is important to recognize that even with the best of intentions, it is possible to miss the mark in one way or another. This initiative is a great way to evaluate whether the curriculum and experience continues to be of value to its participants, identify any room for improvement, and to determine if the passage of time (ten years of the program) has brought the need to pivot in any new directions. In my experience, the most successful programs are those that regularly request feedback and stand ready to make the changes needed to maximize impact. Greater Houston Community Foundation has always been extremely receptive to feedback, so I am not surprised that they are taking this proactive step to make the most of the opportunity they have to educate the next gen with a robust and relevant program that can, hopefully, serve as a blueprint for other community foundations and organizations.

Chris: One of the strategic goals I am focused on with this study is how we can amplify the impact of charitable and strategic giving through sharing our experience and expertise with the field. Greater Houston Community Foundation’s next gen and youth programs are high quality and comprehensive and help grow the skills of future leaders. My hope is that the dollars we have invested in this evaluation and case study will be leveraged further as other community foundations, firms, schools, family foundations, and alumni associations set up their own versions of these programs and engage next gen donors in impactful giving and leadership.

Q: What do you hope other donors will learn about your generation of philanthropists?

Lacey: Our generation is eager to learn, and beyond that, we’re eager to practice strategic giving. And that is exactly what we are learning how to do through the Center for Family Philanthropy. I hope that older generations will learn from us, too, and be excited for the future of philanthropy in Houston. In large part, because of what this program is offering to donors, I believe there will be a big impact in the future of Greater Houston Community Foundation and its long-term sustainability. Additionally, because of the Foundation’s footprint in the broader community, the work we do here has an impact on giving for our entire Greater Houston region. We take what we learn through next gen and use it with our families and with all of the other organizations we are involved in across the community.

Kelly: I’m really hoping that others will find value in what this generation brings to the table with respect to our understanding of the nuances of strategic giving. Recognizing that we are informed and eager to be of service hopefully leads organizations to seek our involvement sooner than in our retirement years, at which point decades of opportunity would be lost. In our ever-changing world, diversity of perspective is key to navigating a successful future, and the next gen program is a readily available resource of passionate individuals eager to share their thoughts to make a difference. As organizations focus on wealth transfer, stewardship of donors, the strength of boards, and long-term impact, the next generation must be considered.

Q: In what ways do you envision the Next Gen Donor Institute evolving in the future?

Lacey: With our newest Gen Impact Fund*, we’re thinking big and outside the box. We’re thinking strategically and very specifically about the city of Houston. I’m excited about the momentum we have as a committed group. It will be exciting to look back five years from now and see the progress we’ve made, as well as the impact we’ve made together.

*Founded in 2019, in partnership with Comic Relief USA/Red Nose Day, Next Gen Alumni collaborate to support organizations focusing on alleviating child poverty in Harris County.

Kelly: Philanthropy is becoming much more strategic, and to best ensure success in that approach, donors and organizations must be surrounded by people who know what they are doing — people who understand the nuances of the business of philanthropy. While nonprofit board service may be similar in many ways to for-profit board service, there are distinctions that must be understood. You cannot apply a one-size-fits-all approach and assume it will work. As the next gen program evolves, I would love to see the development of continuing education curriculum for participants following graduation. Curriculum that instructs one about how to be a good nonprofit board member; where to turn for the latest information regarding policy, taxes, estate law, and community data affecting nonprofits; and how to address particular issues facing donors and organizations (e.g., case studies) would be incredibly valuable. Greater Houston Community Foundation plays such a critical role in Houston, and it seems a natural extension of the existing program to create a “Philanthropy 201” offering.

Q: Why partner with Greater Houston Community Foundation in your philanthropy and education?

Lacey: Greater Houston Community Foundation is the top of the pyramid of giving in Houston because it is so broad-based. I think of it as the organization that sits right here at the top with a view of all the other wonderful nonprofit organizations and groups inside of that pyramid. To be involved with an organization that is looking at Houston as a whole is reassuring.

Chris: Greater Houston Community Foundation has a vast amount of knowledge and resources are leveraged even more when coupled with their donor network. There’s tremendous value in both the programming and network that come along with partnering with Greater Houston Community Foundation in your philanthropy that makes it far superior to other options that are purely financial institutions.

Greater Houston Community Foundation is excited to share our evaluation results with the broader field as part of our commitment to growing effective philanthropy. We want to thank our Board and donors for their commitment to investing in Next Gen donors in Houston and beyond and the Center for Family Philanthropy families who funded this initiative.

To learn more, please reach out to Jennifer Touchet, Vice President of Personal & Family Philanthropy, at jtouchet@ghcf.org.

Thank You to Generous Donors Who Supported This Study

Ben S. Brown
Ann & Peter Fluor
Jerry C. Dearing
Family Foundation
Lacey & Matt Goossen
Kelly & Molly Hackett
Maureen O. & James T. Hackett
Elie E. & Russell C. Joseph
The Kao Family
Jennifer & Chris Laporte
Barry, Rosalyn, & Leslie Margolis
Caren & Rob Sweetland
Chris Weekley
K.C. & Randa Weiner

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Family Philanthropy Day

On November 6, Greater Houston Community Foundation hosted the Sixth Annual Family Philanthropy Day! This year’s theme, Empowering Houston’s Youth, highlighted the important work of the Boys & Girls Clubs of Greater Houston (BGC) as they seek to inspire and enable all youth. In partnership with Generation SERVE and Houston Improvement Project, participants donated items to elevate and strengthen the services offered by the BGC.

Over 100 Thanksgiving meal kits and dozens of learning activities and books were collected. Thank you to our Youth Leadership Team for their time and effort in making this program a success, our nonprofit partners for the incredible work they do to create a lasting impact in our community, and to our donors and families for their continued support.

SCHOLARSHIPS

We all begin our philanthropic journey in different ways and for different reasons. For native Houstonian Mike Dilick, after a successful career leading VLS Recovery Services, he and his wife Tricia wanted to establish a scholarship fund in remembrance of their close friend Bryan Stoltenberg. Bryan grew up in Sugar Land, was an All American at Colorado University, and later played in the NFL for the San Diego Chargers, New York Giants, and the Carolina Panthers. Tragically, Bryan passed in 2013 due to complications from a car accident. He left behind his wife Laura and his three sons. “He was taken away way too early. We always wanted to do something to honor him. He was a strong Christian, and a great role model and mentor to the youth.”

Despite the COVID-19 pandemic, Mike and Tricia were able to work with Greater Houston Community Foundation to establish the Bryan Stoltenberg Memorial Scholarship in the summer of 2020. Their daughter Rachel is on the board of Heights Young Life, a local chapter of a nonprofit that aims to support local youth with a focus on Christian faith. The scholarship offers aid for trade school to two- and four-year college students currently or previously involved in Young Life. In an amazing first year, the scholarship helped support the education of 15 local students with a collective $50,000 in support. In 2021, the scholarship awarded $40,000 to 11 students.

“Our hope is that the students learn that giving is something they can do for someone in the future, too. That they will, later on in life, do something to give back for somebody else and pay it forward. I believe that’s what makes the world go around,” Mike reflected.

“I would have never known how to start this,” said Mike. “My attorney recommended Greater Houston Community Foundation. After a few phone calls and some coordination by their team, we were able to get started very quickly. It was extremely easy and seamless. I am proud to partner with Greater Houston Community Foundation.”

To learn more about scholarships, contact Courtney Grymonprez, Scholarships Manager, at cgrymonprez@ghcf.org.

“The Bryan Stoltenberg Memorial Scholarship

“I think people need to know that giving is good for the soul. There are a lot of people who are in need. We can continue to help the community grow and be better. That’s what we want to do.”

MIKE DILICK

(left to right) Mike Dilick, Tricia Dilick, Bryan Stoltenberg, and Laura Stoltenberg.
Connecting Houston’s Philanthropic Ecosystem

Advisors’ Impact with Karen Costa

When you think of charitable giving, it’s transactional at the surface, but when you dig a little bit deeper into the ‘why’ behind philanthropy and charitable giving, it’s about relationships and legacy. Karen Costa has over 20 years of experience working in public accounting serving ultra-high net worth families and family offices. She currently leads the National Family Office Advisory Center within RSM US LLP.

“When I look back into my professional career, I can’t remember a time when Greater Houston Community Foundation wasn’t visible to me. Over the past few years, we’ve been able to collaborate across a number of different areas,” said Karen. Outside of client work, Karen and her team have been able to collaborate with the Community Foundation, including a culture initiative that brings generational training to RSM employee network groups.

Advisors play a multifaceted role in philanthropy. They are critical in helping donors understand personal preferences and values in regards to their giving. Donors are able to learn more about the right giving vehicles not just for today, but also for what is sustainable in the future. Additionally, donors look to advisors as trusted confidants and sounding boards to make the right long-term decisions.

“It goes much deeper than a transaction, it becomes much more personal.” Karen added, “Being that voice of reason is a big part of what we do… to be a reliable partner that can walk the walk alongside them as they go through their philanthropic journey.”

“I think what makes Greater Houston Community Foundation unique and very attractive to clients and potential prospects is the level of care and service. What the Community Foundation gives back to donors in terms of education is something very unique that other institutions can’t really provide.”

KAREN COSTA, RSM US LLP

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NEW FUNDS IN 2021

ALMAAHH Fund
Always do Good Fund
Anderson Family Scholarship Fund
Angel Woolsey Charitable Fund
Avani and Nikhil Narang Fund
Barnes and Joanne Barnwell Charitable Fund
BGM Family Charitable Fund
Brenda and John H. Duncan Rise School of Houston Fund
Christina and Stuart Smith Foundation
CKW Giving
Coastal Restoration Fund
Complete Communities Improvement Fund
David and Ashley Bilger Family Fund
Deutser Clarity Donor Advised Fund
DM Cares Fund
Eleanor and Frank Fredd Foundation Fund
Elisabeth G. Nash Scholarship
EMMANOR Charitable Fund
Flying with Alex Fund
Gude & Mirtipati Legacy Fund
Harris County COVID-19 Vaccination Scholarship Program Fund
Harvest Disaster Relief Fund
Harvest Midstream Company Fund
Hilcorp Employee Donor Advised Funds
Houston Emerging Charter School Fund
Houston Harris County Winter Storm Relief Fund
IMG Charitable Impact Fund
Jacky and Misty Lee Family Charitable Fund
Judy Belanger, Helping Others Fund
Knapp Family Charitable Fund
Lee and Walker Family Fund
Madison Finger Charitable Fund
Mark R. Livesay Family Fund
McDonald’s RLC/ROA McFamily Relief Fund
Michael, Benamin, and Elisabeth Marek Charitable Fund
Microsoft Complete Communities, Sustainability, Resiliency, and Equity Fund
Nancy C. Smith Foundation
NRG Chairman’s Scholarship
Peter and Fan Morris Fund
Pink Bows Foundation
Robert & Susan Barnwell Charitable Fund
Sam J. Lucas Jr. Scholarship Program
Scotty Lee and $3 Charity Fund
Society of St. Vincent de Paul Endowment for Aid to the Poor of Greater Houston
SOLA Employee Emergency Relief Fund
Spring Branch Human Resources Partnership, Inc.
St. Timothy’s Anglican Church Fund
Strong Family Scholarship Fund
Texas Clean Energy and Climate DAF
Texas Educational Foundation Fund
Texas Equitable Vaccine Uptake Fund
The 100 Black Men of Metropolitan Houston Scholarship Fund
The Bengal Tiger Fund
The Camp Family Fund
The Cook Family Century Fund
The Luke Thomas White Memorial Scholarship Fund
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For questions about fund recognition, contact Mark Folkes, Chief Advancement Officer, at mfolkes@ghcf.org or 713.333.4620.

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Center for Family Philanthropy
Next Gen Donor Institute
Family Meetings
Interest Area Programming & Learning Opportunities
Corporations – Customized Programs

WORKING WITH PROFESSIONAL ADVISORS
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Acceptance of Complex Assets
Solution-Oriented Services for Clients

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