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Trust Us

What do you expect from the charities you support? What cements the relationship between you and a charity? If you give once, why do you give again?

A donor survey published recently in The Chronicle of Philanthropy took a close look at these questions. Yes, donors stressed that charities must manage administrative costs. Donors also stressed that they don't like to be treated as simply a source of money. But, these responses came from only about half of the people surveyed.

So what was at the top of the list? Almost 90 percent of the donors who responded to the survey said that "being honest in their business practices" was the donors' top expectation of charities. This answer was followed by other similar requests: "being honest in their relationship with donors," "not being rude" and "using gifts only for what they say they will." In essence, the most common answers boil down to one word: trust.

These responses are a sign of the times. We expect more transparency and accountability than ever before in commercial business these days. Whether you think it goes too far or not far enough, the Sarbanes-Oxley Act would be exhibit No. 1 at the trial of public confidence in the integrity of American businesses. We want to be able to trust the institutions and

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DPD Acquires Video Equipment for Cars.

Largest purchase to date with \$15 million grant from W. W. Caruth, Jr. Foundation at CFT

Police officers patrolling the streets of Dallas soon will have new tools to fight crime with the help of \$3.2 million from the W. W. Caruth, Jr. Dallas Police Special Project Fund of Communities Foundation of Texas. The purchase of advanced mobile data computers and mobile digital video equipment for 336 police cars continues the first phase of the \$15 million Caruth Foundation grant CFT announced last August.

After announcing the purchase, Dallas Police Chief David Kunkle invited the media to take a look at sample equipment in a squad car. "The new technology will give our officers the tools they need to fight crime more effectively by improving communications," he said. "We anticipate the MDCs and video cameras will improve officer safety, deter unwanted actions by violators and enhance the evidence prosecutors need when a crime is committed."

City Manager Mary Suhm said the DPD will be one of the first to employ the new digital system, which will put the city at the forefront. "We are grateful to Communities Foundation of Texas for making this purchase possible. Every resident of Dallas will enjoy a safer place to live because of this public-private initiative."

The mobile equipment is the largest purchase by the Dallas Police Department from the first phase of the \$15 million grant from the Caruth Foundation. In November, the department purchased 400 cell phones and service with funds from the grant's \$5 million first phase. The remaining phase one resources will be spent on additional equipment purchases, which the department expects to have completed by September.

The next phases of the Caruth Foundation grant will provide up to an additional \$10 million. Phase two will focus on studying the best police practices in other cities and determining which approaches will improve public safety in

Dallas. Phase three calls for developing and implementing a comprehensive strategic plan based upon what is learned. The \$15 million grant was the largest ever made from the W.W. Caruth, Jr. Foundation and one of the largest in the 53-year history of Communities Foundation of Texas. It is also the largest grant on record made through a public foundation to a police department anywhere in the country.

Brent Christopher, president and chief executive officer of CFT, said the Dallas Police Department is on track with the grant, which calls for the first phase to be funded and equipment purchased by September 2006 based upon the cash flow of the grant. "We are very pleased with the deci-

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April 27, 2006 - The Dallas Police Department is on track to spend \$15 million in grants from the W.W. Caruth Jr. Foundation at CFT. From left, Mary Suhm, Dallas City Manager; Brent Christopher, CFT President and Chief Executive Officer; David Kunkle, Dallas Police Chief.

Photograph by Steve Foxall

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the people with whom we deal. Why should charities be different? For all of us at CFT, this means two things. First, we reaffirm the value of our relationship with you. In that regard, it's a pleasure to announce the addition of several new key staff members to our team: Dwight Clasby, as vice president of external affairs, Jackie Franey, as director of gift planning and donor relations, and Christine Caffey, as director of communications and special events. You can read more about them in the adjoining article. All three are outstanding, experienced professionals who strengthen our commitment to service with integrity in the business of philanthropy. Along with their other colleagues on our staff, they will help to keep us connected with you and responsive to your needs.

Second, we reaffirm our obligation to be open communicators. This is the basis of trust. Good communication also enhances our value-added role as a unique resource for donors about the non-profit community. It enables us to be a bridge between a donor's charitable interests and the needs of effective charitable organizations. That's why we started the "Worthy of Consideration" twice-yearly column in this newsletter to share with you strong proposals for grants that remained unfunded at the end of the last competitive grantmaking cycle at CFT after our trustees awarded all of the available discretionary resources. We hope this information will be useful to donors who may be considering grant recommendations from their donor-advised funds. The information also is listed on the updated CFT website (www.cftexas.org). In the weeks and months ahead, we will examine more ways we can expand our service to donors and to the community while continuing to earn your trust.

In the meantime, don't hesitate to let us know what you think. Relationships are a two-way street, and we're always glad to hear from you.



Brent E. Christopher
 President and Chief Executive Officer

CFT Welcomes New Donor Relations Team.

To help donors achieve their charitable and financial goals, Communities Foundation of Texas works closely with donors and their advisors to create customized giving plans.

Part of this service is offered by CFT's donor relations team, which recently welcomed Dwight D. Clasby as vice president of external affairs, and Jackie W. Franey as director of gift planning and donor relations. Mr. Clasby and Ms. Franey sat down to discuss their new roles at CFT and how they work with donors and the community.

Q. Dwight, how do you see your role at CFT?

A. The need for charitable donations from individuals and the private sector has become more important than ever over the past few years due to natural disasters, budget reductions and increasing needs. By working with the foundation's donors – both new and established – the team I lead will focus on understanding each donor's charitable and financial objectives to create a plan that will meet the donor's philanthropic wishes. Through customized giving solutions, expert grantmaking and prudent stewardship, our goal at CFT is to build relationships on trust and confidence. Serving others and multi-generational giving are two important issues that our team will help promote in order to continue fueling investments in the lives of people through philanthropy.



Dwight Clasby

Q. And you'll also be working with the community?

A. Yes, although CFT has been working with donors and organizations for over fifty years, we need to enhance public awareness of the foundation and its role in the community. As a public charity we are a valuable

resource for donors, professional advisors and organizations that are connected through the practice of giving.

Q. How else can you help donors?

A. *Bringing Visionary Philanthropists and Worthy Causes Together* is a primary goal of everyone associated with CFT. We listen carefully to donors and fund advisors. We also have a deep knowledge of the community and the ability to build bridges between donors and effective organizations. By linking the two, grants can be made that meet the wishes of the donor and the needs of the recipient. You can expect to hear from us during the year ahead about new ideas that will enable CFT to empower our donors even more.

Q. Jackie, please explain your role.

A. Working with new and existing donors to create an appropriate philanthropic plan that meets their needs is at the core of CFT's mission. I'm here to work with donors and advisors as they consider all gifts, especially estate and charitable planning. Whether it's cash, stock, real estate – whatever the asset – we can help donors meet their charitable and financial goals.



Jackie Franey

Q. How do you go about doing this?

A. We work in tandem with advisors to help educate donors about their charitable options. CFT doesn't offer specific tax or legal advice, but we do assist donors in working with their own qualified professional advisors in creating new giving opportunities. If a donor wants to help causes broadly or specific organizations, we can help them figure it out, whether it is through lifetime giving or by bequest. We are available any time as a resource to donors and advisors.

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Worthy of Consideration.

Chances to give; recommended CFT grant requests that weren't funded

Communities Foundation of Texas receives many grant requests that are worthy of support, but limited discretionary funds make it impossible for trustees to approve all of these requests.

CFT encourages donors and fund advisors to consider the following worthwhile grant requests that could not be funded at the March meeting of the Grants Distribution Committee:

Audubon Texas, the local chapter of the National Audubon Society, sought \$100,000 to construct the Dogwood Canyon Audubon Center, part of a campaign to secure approximately 280 acres of natural habitat for birds and other wildlife in the Dallas-Fort Worth area.

Central Dallas Food Pantry, doing business as Central Dallas Ministries, requested \$50,000 to upgrade computer hardware and software in order to meet growing needs, including community medical and dental clinics, a food pantry, a public interest law firm,

foster care and a gymnasium.

Dallas VA Fisher House Fund of CFT asked for \$200,000 toward the \$1.25 million campaign to construct a 7,500-square-foot Fisher House at the Dallas VA Medical Center to provide short-term housing for families of patients receiving medical treatment.

The Family Place, which works to eliminate family violence, sought \$11,028 to purchase a new copy machine and first year of service for its administrative and outreach offices.

Friends of the Dallas Public Library requested \$100,000 to assist in the purchase and first-year operating expenses and salaries for a second bookmobile unit.

Girls Inc. of Metropolitan Dallas asked for \$19,800 to develop a five-year strategic plan with the Center for Non-Profit Management to allow the organization to offer a new level of program services and non-profit management.

Greater Dallas Youth Orchestra sought \$6,500 to support the music library project by purchasing music, a database program and proper storage for the music.

Hope Cottage, which provides wide-ranging adoption services, requested \$40,000 to provide for capital needs to establish the Hope for

Families Counseling and Education Center.

National Center for Policy Analysis asked for up to \$250,000 to support the Debate Central website that seeks to provide students from disadvantaged and low-income school districts with cost-free access to debate material.

Texas Trees Foundation requested \$100,000 to complete the "seed-money" funding for the Hamilton Park Urban Tree Farm, to be located at I-635 and TI Boulevard.

Walden Chamber Music Society sought \$6,500 to cover the approximate cost of one concert.

When Bob Titus, a CFT donor, read the winter 2006 edition of *Impact* and saw the opportunities for giving outlined in the "Worthy of Consideration" list, he took action. He promptly requested that \$25,000 from his donor-advised fund be transferred to CFT discretionary funds for the needs of organizations like those outlined in the column.

For more information about any of the funding requests in this section as you consider your own grant recommendations, please contact the CFT grants department at (214) 750-4222. 🍷

Religion Newswriters Meet at CFT

Guests of the Religion Newswriters Foundation discussed a host of ethical issues about living in our frantic society during a lively April luncheon at Communities Foundation of Texas.

The program included a panel discussion on "Not Giving up a Life for a Living: the Pursuit of Ethics, Empathy and Effectiveness in a Fast-Paced World." Panelists were Diane Connolly, editor of Religion Link; Robin W. Lovin of the Southern Methodist University Perkins School of Theology; J. McDonald Williams, founder of the Foundation for

Community Empowerment; and Colleen Townsley Brinkmann, director of communications and marketing for North Texas Food Bank.

Bob Mong, president and editor of *The Dallas Morning News* and president of the Religion Newswriters Foundation, said, "We wanted to explore the idea of how thoughtful and successful people grapple with the need to contribute to society." 🍷

Photograph by Andy Hanson



From left, Bob Mong, president of the Religion Newswriters Foundation and president and editor of *The Dallas Morning News*, with luncheon guests Susan and Thomas Stanzel, long-time donors to CFT.

Boone Pickens Partners with CFT.

Donor-advised fund benefits medicine, education, culture, disaster relief

From time to time, *Impact* will take a look at some of the donors to Communities Foundation of Texas, their approaches to philanthropy and how they work with the foundation to achieve their goals.

At the age of 78, with many high-profile accomplishments under his belt, Texas oilman and entrepreneur Boone Pickens could easily sit back and enjoy life. But after 40 years with the company he founded, Mesa Petroleum, he started BP Capital in 1996, which has become one of the nation's most successful energy-investment funds. In addition to leading the \$4 billion firm still today, Mr. Pickens is pursuing other business interests, from water marketing to advocating natural gas as a clean-burning fuel.

Sharing his wealth to help others, long a focus throughout his professional life, now looms even larger for Mr. Pickens. *The Chronicle of Philanthropy* ranked him fifth last year among all American philanthropists for

"I'm convinced the Lord put me in this life to make money and be generous with it."

his charitable giving. His gifts in 2005 included an attention-getting \$165 million personal gift for the athletic programs at his alma mater, Oklahoma State University. In a recent profile in *The Dallas Morning News*, Mr. Pickens said his "unfinished business" is to make more money so he can give it away to charities and causes. "I'm convinced the Lord put me in this life to make money and be generous with it," he said. A priority is to give while he can actually see the results.

When it comes to philanthropy, Mr. Pickens employs the same team-building approach that has made him a success in business. One aspect of that approach is hiring experts to help him make informed decisions. He employs a full-time staff member to study requests from

Southwestern Medical Foundation.

Born in Holdenville, Okla., Mr. Pickens also has been generous to his home state. Grants from the Pickens fund at CFT have benefited the V. Brown Monnett Chair of Petroleum Geology at OSU in Stillwater as well as the



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Boone Pickens conducts his charitable giving with the same team-building approach that made him a success in business.

organizations seeking his support. In 2004, Mr. Pickens also turned to Communities Foundation of Texas, where he established a fund to help manage some of his giving.

"The people at CFT bring unique knowledge to a particular aspect of our philanthropy," he said. "CFT is a cost-effective way to approach charitable giving."

Mr. Pickens has used his donor-advised fund at CFT to support a broad array of worthy organizations that are making a difference on higher education, medical research, cultural interests and disaster relief. Among the recipients of major grants from his fund are the Alzheimer's Women's Association for Resources & Education, the American National Red Cross, the Dallas Center for the Performing Arts Foundation, Johns Hopkins University and

Oklahoma Heritage Association for the Edward L. Gaylord and Boone Pickens Oklahoma Heritage Center in Oklahoma City.

"When Boone Pickens came to Communities Foundation of Texas to establish his fund, he had already made his name as a bold philanthropist," said Brent E. Christopher, president and chief executive officer of CFT. "It is our privilege to partner with him. The knowledgeable staff and resources of CFT enable us to act on his trust in a way that continues to strengthen vital charities doing important work." 🙌

Number of CFT
Donor-Advised Funds

474

(out of 811 total funds)

Visit Us at Our New Website.

A fresh face for the foundation: www.cftexas.org



CFT's new, improved website offers a more complete explanation of what the foundation does and how it does it through the generosity of donors. Visitors to the site can explore it on their own, or customize the pages based on their interests. Pay us a visit soon!

Donor Relations Team Creates Customized Plans

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Both Mr. Clasby and Ms. Franey joined CFT after serving in fund-raising roles at other not-for-profit organizations. Mr. Clasby moved to Dallas from Fort Lauderdale, Fla., and has more than 25 years of fund-raising experience. He has directed advancement efforts at four prominent independent schools, including St. Mark's School of Texas. His professional career also has included banking positions at RepublicBank Dallas and Preston State Bank.

Ms. Franey worked in planned giving at Children's Medical Center Dallas. Previously, she held a similar position during her decade tenure at the national office of the American Heart Association. Last year she served as president of the North Texas Chapter of the National Committee on Planned Giving.

For any questions about giving or the services of the foundation, please contact Dwight Clasby at (214) 750-4256 or dclasby@cftexas.org, or Jackie Franey, at (214) 750-4255 or jfraney@cftexas.org.

Also new to the donor relations team is Christine Caffey, director of communications and special events. She joined Communities Foundation of Texas after nine years on the donor relations staff at Baylor Health Care System Foundation. Previously, Ms. Caffey worked in corporate communications for an oil and gas company. Her communications duties at CFT include serving as editor of the *Impact* newsletter. She may be reached at (214) 750-4246 or ccaffey@cftexas.org.

Allstate Foundation Grants \$200,000 for Hurricane Relief

Thousands of Gulf Coast residents are receiving help in rebuilding their lives after Hurricane Rita, thanks to almost \$200,000 in grants awarded by the Allstate Foundation to 16 non-profit organizations, in partnership with Communities Foundation of Texas.

In January, the Allstate Foundation set up the Hurricane Recovery Fund, a designated fund at CFT, to benefit organizations working to provide family housing, community and medical services to victims of the September 2005 hurricane. The Allstate Foundation is an independent charitable organization funded by contributions from subsidiaries of the Allstate Corporation. CFT managed the competitive grantmaking process.

"The Allstate Foundation's goal for the Hurricane Recovery Fund is to provide a broad cross-section of southeast Texas' non-profit organizations with the ability to continue the programs that our community needs," said Rich Crist, field vice president of Allstate's Texas region. "These selected organizations are creating homes from salvaged lumber, feeding a growing population, providing financial counseling to affected families, offering medical services to seriously ill patients and relaunching programs targeted to young people in our community. We are proud to be a part of their rebuilding."

Among the organizations receiving Allstate Foundation funds were Gulf Coast Interfaith on behalf of Southeast Texas Interfaith Organization for Disaster Recovery, Ubi Caritas (health clinic), Orange Community Action Association, Beaumont Association for Senior Citizens, Port Cities Rescue Mission, Some Other Place, Inc., and Rape and Suicide Crisis of Southeast Texas.

The Allstate Foundation Hurricane Recovery Fund's grants in southeast Texas are part of Allstate's regional program providing more than \$1.2 million in grants to non-profit organizations affected by hurricanes Rita and Katrina.



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sion of the city, working in tandem with the department, to select equipment that will make such a tangible difference every day for the officer on the street," he said. "This investment in digital technology will mean a safer Dallas and will continue the legacy of Will Caruth, who had a strong commitment to public safety."

Communities Foundation of Texas Board Chairman Charles J. Wylie, Jr., said, "CFT trustees are pleased to play a part in this historic investment in improving public safety. W.W. Caruth,

Jr. believed it was important for the philanthropic community, as well as all citizens, to support the Dallas Police Department. We hope others will join with us and the Meadows Foundation, which also has made a recent public safety investment in the city, to support the work of our police officers." 🍂

Photograph by Steve Foxall



J. Cook, CFT Vice President, Grants, checks out the mobile video and computing equipment in a Dallas police car, made possible as part of a \$15 million grant from the W. W. Caruth Jr. Foundation at CFT.

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