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 boiled 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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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.

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.

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. 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.

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Worthy of Consideration.

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 $30,000 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 copier 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.”
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 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 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.

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

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 Southwestern Medical Foundation.

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.”

Boone Pickens Partners with CFT.
Donor-advised fund benefits medicine, education, culture, disaster relief
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.

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.
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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 invest-
ment in digital technology will mean a safer
Dallas and will continue the legacy of Will
Caruth, who had a strong commitment to pub-
llic safety.”

Communities
Foundation of Texas
Board Chairman
Charles J. Wyly, 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 philan-
thropic 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 pub-
llic safety investment in the city, to support the
work of our police officers.”

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.