June 10, 2014

Dear Reader,

Since 1953, Communities Foundation of Texas (CFT) has grown to become one of the largest community foundations in the nation. But, what exactly is a “community foundation” and what does it do? A community foundation like CFT operates on both sides of the nonprofit fence—receiving tax-deductible gifts as a public charity, and also granting money to other nonprofits and individuals (such as scholarships to students), just like any charitable foundation. Community foundations have different kinds of funds, such as donor-advised funds, through which individuals streamline and thoughtfully manage their charitable giving, while retaining a role in determining how and when the money is distributed; and discretionary funds, which have no ongoing donor input and are committed by the foundation’s board and staff to the highest and best use in the community. To determine the areas of impact for the foundation’s discretionary grantmaking, we rely on multiple approaches:

- **Traditional grantmaking**, where applications are received from nonprofits and those selected are sent a check to support their work in the community;

- **Hands-on participative grantmaking**, which involves teaching and learning about an issue along with nonprofits and developing funding opportunities together; and

- **Program implementation**, through which CFT creates, runs, and (at times) advocates for best-practice programs in a given area.

Over the past 60-plus years, CFT has focused primarily on sharing what we have done in terms of traditional grantmaking—what grants have been made, to which nonprofits, and in what amounts. However, this story is only the beginning of our work and does not indicate how well we are meeting our ultimate goal: to contribute to lasting positive impact in our community through our investment of staff time and talent, and through the use of the monetary treasure that we steward across our funds.

Now, we are ready to share how well we are meeting that over-arching goal through CFT’s inaugural **Impact Report**. This year, we won’t cover everything. For us, “starting somewhere” means focusing primarily in this report on our three biggest areas of discretionary activity:

- **Community Impact** grantmaking (focused on academic success for at-risk middle school youth and economic stability for low-income working families);

- **W.W. Caruth, Jr. Foundation** grantmaking (focused on public safety, education, and medical and scientific research); and

- **Educate Texas** grantmaking and program work (focused on a statewide public–private education initiative operating as a program of CFT).
The report provides detailed insight into the activities, the hoped-for impact, and the results in each of these areas. Our intention is for us, and you, to use the data culled from our results and experiences as a flashlight, rather than a hammer. By sharing these experiences through this report, we hope that you will learn along with us, and share in the celebration of the successes across our community accomplished by outstanding organizations.

For those of you who wade into this work-in-progress, your thoughts and feedback about the report are welcome at impact@cftexas.org.

Finally, thanks to the many of you in the community whose work we have the pleasure to support. Through your hands the real change in our society occurs, and through you the impact that we report takes place. Our community is stronger because of you.

Sincerely,

Sarah Cotton Nelson  
Chief Philanthropy Officer

John Fitzpatrick  
Executive Director, Educate Texas

George Tang  
Chief Operating Officer, Educate Texas

Jeverley Cook  
Executive Director, W.W. Caruth, Jr. Foundation

MISSION

Communities Foundation of Texas stimulates creative solutions to key challenges in our community.
We thoughtfully and effectively support our diverse donors and grantees by providing exemplary service and by demonstrating accountability.
We improve lives through an unwavering commitment to lasting impact.
# Table of Contents

List of Key Terminology .............................................................. 5

A Hub for Philanthropy ............................................................... 6

Community Impact Funding: At-Risk Middle School Youth .......... 7
  Program Context
  Activities
    Middle School Teacher and School Leader Pipeline Grants
    Middle School Teacher and School Leader Professional Development Grants
  Results, Learning, and Refinement

Community Impact Funding: Economic Security for the Working Poor 14
  Program Context
  Activities
    CFED Assets & Opportunities Profile for Dallas
    Training and Coaching
    Convene Stakeholders
    Fund Additional Data
    Identify Working Poor Program Areas for Grantmaking
  Results, Learning, and Refinement
  Case Study: Data Driven Decision-Making (D3) Institute

Educate Texas ........................................................................... 25
  Program Context
  Activities
    College-Ready Standards and Practices
    Postsecondary Access and Success
    Human Capital and Teacher Effectiveness
    Collective Impact
  Results, Learning, and Refinement
  Case Study: Blended Learning and Texas Teaching Technology Innovation Fund (T3IF)
  Case Study: Community Colleges and Student Success
  Case Study: Effective Teaching and Human Capital in School Districts

W.W. Caruth, Jr. Foundation ..................................................... 44
  Program Context
  Activities
    Public Safety
    Education
    Medical and Scientific Research
  Case Study: Creating a Model STEMI Program
  Case Study: Improving Leadership in the Dallas Police Department (DPD)

Communications ....................................................................... 64
  Context
  Activities
    Strategic Grantmaking
    Furthering Philanthropy

Gift of Space ........................................................................... 81

Field Leadership ....................................................................... 82
# List of Key Terminology

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT</td>
<td>American College Testing</td>
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<tr>
<td>AEIS</td>
<td>Academic Excellence Indicator System</td>
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<td>AHA</td>
<td>American Heart Association</td>
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<tr>
<td>AMI</td>
<td>Acute Myocardial Infarction</td>
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<td>AP</td>
<td>Advanced Placement</td>
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<td>AVID</td>
<td>Advancement via Individual Determination</td>
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<td>CAGR</td>
<td>Compounded Annual Growth Rate</td>
</tr>
<tr>
<td>CFED</td>
<td>Corporation for Enterprise Development</td>
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<td>CFT</td>
<td>Communities Foundation of Texas</td>
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<tr>
<td>CISD</td>
<td>Coppell Independent School District</td>
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<tr>
<td>CMCR</td>
<td>Children's Medical Center Research Institute</td>
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<tr>
<td>CPE</td>
<td>Continuing Professional Education</td>
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<tr>
<td>CPI</td>
<td>Caruth Police Institute</td>
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<tr>
<td>CRI</td>
<td>Children's Research Institute</td>
</tr>
<tr>
<td>C-SER</td>
<td>Center for STEM Education and Research at University of Texas at Dallas</td>
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<tr>
<td>D3</td>
<td>Data Driven Decision-Making Institute</td>
</tr>
<tr>
<td>DARCC</td>
<td>Dallas Area Rape Crisis Center</td>
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<tr>
<td>DCCCD</td>
<td>Dallas County Community District Foundation</td>
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<tr>
<td>DFW</td>
<td>Dallas-Ft. Worth</td>
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<tr>
<td>DISD</td>
<td>Dallas Independent School District</td>
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<tr>
<td>DMN</td>
<td>Dallas Morning News</td>
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<tr>
<td>DPD</td>
<td>Dallas Police Department</td>
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<tr>
<td>ECHS</td>
<td>Early College High School</td>
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<tr>
<td>EFNT</td>
<td>Entrepreneurs for North Texas</td>
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<tr>
<td>EKG</td>
<td>Electrocardiogram</td>
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<tr>
<td>EMS</td>
<td>Emergency Medical Services</td>
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<tr>
<td>FSG</td>
<td>FSG Social Impact Consultants (formerly FSG Social Impact Advisors)</td>
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<tr>
<td>GPA</td>
<td>Grade Point Average</td>
</tr>
<tr>
<td>ILEA</td>
<td>Institute for Law Enforcement Administration</td>
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<tr>
<td>ISD</td>
<td>Independent School District</td>
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<tr>
<td>KIPP</td>
<td>Knowledge is Power Program (KIPP Academy)</td>
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<tr>
<td>MAP</td>
<td>Measures of Academic Progress</td>
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<tr>
<td>MET</td>
<td>Measuring Effective Teaching</td>
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<tr>
<td>MSPP</td>
<td>Middle School Partnership Plan</td>
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<tr>
<td>NAPE</td>
<td>National Alliance for Partnerships in Equity Education Foundation</td>
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<tr>
<td>NCAN</td>
<td>National College Access Network</td>
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<tr>
<td>NGLC</td>
<td>Next Generation Learning Challenge</td>
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<tr>
<td>NTFF</td>
<td>North Texas Funders Forum</td>
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<tr>
<td>RGV</td>
<td>Rio Grande Valley</td>
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<tr>
<td>SAFE</td>
<td>Sexual Assault Forensic Examiner</td>
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<td>SANE</td>
<td>Sexual Assault Nurse Examiner</td>
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<tr>
<td>SAT</td>
<td>Scholastic Aptitude Test</td>
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<tr>
<td>SMART</td>
<td>Strategic Memory Advanced Reasoning Training</td>
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<tr>
<td>SMU</td>
<td>Southern Methodist University</td>
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<tr>
<td>SOAR</td>
<td>Symptom Onset through Arterial Reperfusion</td>
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<tr>
<td>STEM</td>
<td>Science Technology Engineering Math</td>
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<tr>
<td>STEMI</td>
<td>ST-Elevation Myocardial Infarction</td>
</tr>
<tr>
<td>SWS</td>
<td>School Within a School</td>
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<tr>
<td>T3IF</td>
<td>Texas Technology, Teaching and Innovation Fund</td>
</tr>
<tr>
<td>TAB</td>
<td>Texas Association of Business</td>
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<tr>
<td>TEA</td>
<td>Texas Education Agency</td>
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<tr>
<td>TFA</td>
<td>Teach for America</td>
</tr>
<tr>
<td>THECB</td>
<td>Texas Higher Education Coordinating Board</td>
</tr>
<tr>
<td>T-STEM</td>
<td>Texas' Science Technology Engineering and Math</td>
</tr>
<tr>
<td>THP</td>
<td>Texas Health Presbyterian Foundation</td>
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<tr>
<td>THSP</td>
<td>Texas High School Project (now Educate Texas)</td>
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<tr>
<td>TPHD</td>
<td>Texas Health Presbyterian Hospital Dallas</td>
</tr>
<tr>
<td>TxCAN</td>
<td>Texas College Access Network</td>
</tr>
<tr>
<td>UTD</td>
<td>University of Texas at Dallas</td>
</tr>
<tr>
<td>UTSW</td>
<td>University of Texas Southwestern Medical Center</td>
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<tr>
<td>WIN</td>
<td>Workforce Innovation Needs</td>
</tr>
</tbody>
</table>
A Hub for Philanthropy

Donors, nonprofit organizations and other community partners rely on Communities Foundation of Texas (CFT) as an effective hub of philanthropy.

As the largest community foundation in Texas and one of the largest in the nation, CFT works with families, companies, nonprofits and other funding organizations to strengthen our communities through a variety of charitable funds and strategic grantmaking initiatives.

CFT is committed to serving and understanding donor needs, expertly handling complex gifts, wisely managing charitable funds, and leveraging its vast community knowledge to increase charitable impact. The foundation professionally manages more than 950 component funds and has awarded over $1.3 billion in charitable grants since its founding in 1953. Please visit CFTexas.org to learn more.

Communities Foundation of Texas offers extensive resources for its donors, including philanthropic advisory services to multiply donor impact in charitable passion areas, as well as opportunities for education and events.
Community Impact Funding: At-Risk Middle School Youth

Program Context

In 2009 Communities Foundation of Texas’ board of trustees selected the at-risk middle school youth space as one of its two Community Impact focus areas. The goal was to support efforts to increase the quantity and quality of teachers and school leaders coming into the profession—and those currently working in local high-need urban middle schools—as a key lever of overall retention and graduation rates.

CFT’s middle school grants are designed to support the implementation of initiatives and programs that provide specific professional development programs, strategies, and models that will create a larger pool of highly qualified teachers and school leaders and/or will enhance the skills and knowledge of current teachers and school leaders in high-need urban middle school campuses. The hypothesis is that doing so will ultimately increase overall student performance. In particular, CFT determined that it would initially focus on supporting programs that can accomplish the following:

- Identify candidates and provide professional/leadership development opportunities for teachers and administrators who have the characteristics needed for future teaching and/or leadership roles within high-need urban middle schools or school systems
- Create opportunities for the enhanced ongoing development of teachers and school leaders so that they can improve their subject-matter knowledge and the pedagogical skills they use to impart the specialized knowledge/content of their subject area(s), including the achievement of high-quality required continuing professional education (CPE) credits
- Promote the implementation of teacher and administrator skill and competency development, including data-informed teaching and leading; and the integration of research and technology-based methods into the curriculum
- Provide opportunities for the enhanced ongoing development of administrators to improve and enhance competencies attributable to strong leadership, including but not limited to supervising and motivating staff, coordinating curriculum, promoting and sustaining a positive school learning climate, and evaluating student performance.
In July 2012, CFT announced its first round of middle school teacher and school leader pipeline and professional development grants totaling more than $2 million, and in 2013 it awarded an additional $1.3 million in pipeline and professional development grants.

Activities

Activities in the at-risk middle school Community Impact funding area include Middle School Teacher and School Leader Pipeline Grants and Middle School Teacher and School Leader Professional Development Grants. Table 1 lists the grantees, along with the use of the grants and the amounts. We then summarize the programs funded as part of the middle school investment strategy.

Table 1. At-Risk Middle School Community Impact Funding for Teacher and School Leaders

<table>
<thead>
<tr>
<th>PIPELINE GRANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grant Recipient</strong></td>
</tr>
<tr>
<td>Teaching Trust, Aspiring Principals Program</td>
</tr>
<tr>
<td>University of Texas at Dallas, UTeach Dallas</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>PROFESSIONAL DEVELOPMENT GRANTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grant Recipient</strong></td>
</tr>
<tr>
<td>Teach for America (TFA)</td>
</tr>
<tr>
<td>Big Thought</td>
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<tr>
<td>Plano ISD Education Foundation</td>
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<tr>
<td>National Alliance for Partnerships in Equity Education Foundation (NAPE)</td>
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<tr>
<td>University of Texas at Dallas, Center for BrainHealth</td>
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<tr>
<td>Uplift Education</td>
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<td>KIPP DFW</td>
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</tbody>
</table>
Middle School Teacher and School Leader Pipeline Grants

Teaching Trust, Aspiring Principals Program. Because principals don’t have a middle management pathway to the job, they manage a significant number of direct reports, often without receiving appropriate preparation in leading and developing effective teachers and establishing a school culture that supports high achievement for all students. The Teaching Trust’s Aspiring Principals Program addresses these critical needs so that participating principals are prepared and highly motivated to take on the challenges of leading an urban school. Current and future school leaders selected to participate in the program complete a two-year master’s-level program that includes a clinical “residency” during the second year of the program, in which each aspiring leader is placed in a leadership role on an urban campus and given extensive coaching/feedback from Teaching Trust faculty.

Candidates are admitted to the program after a rigorous, highly competitive recruitment and selection process. Once admitted to the program, candidates commit to five years with their partner school districts—two in the program and then at least three while serving in a leadership role on a campus in their district.

In spring 2013, 25 individuals were selected to participate in the program’s third cohort, including 10 currently serving in middle schools. An additional 10 middle school leaders from the program’s second cohort are currently serving in middle schools in Dallas ISD, Irving ISD, and Uplift Education schools. The organization’s goal is for 90 percent of program participants to achieve an “effective” rating on all critical competencies in their individual development plans at the end of the two-year program, and for 90 percent of program graduates to be placed in leadership positions on Title I campuses.

To determine the overall impact of the program, Teaching Trust will be seeking improvements in school culture, as measured by staff and student attendance, staff turnover, teacher and parent satisfaction, and reductions in disciplinary issues. Growth and proficiency in teacher effectiveness will also be measured by student achievement gains.

University of Texas at Dallas (UTD), UTeach Dallas. UTD’s UTeach Dallas is one of 34 replication sites of the highly successful UTeach STEM teacher preparation program at The University of Texas at Austin. Students are actively recruited from the UTD pool of undergraduate STEM majors to consider a career teaching middle and high school math and science. UTeach’s goal is to build a pipeline of highly qualified, highly prepared middle school STEM teachers who will be placed in local high-need school districts by allowing students to complete their STEM degrees and teacher certifications within four years. After graduation, placement and induction support continues through partnerships with local school districts. Partner districts currently include Richardson, Garland, Carrollton-Farmers Branch, and Dallas ISDs.

UTD has more than 300 students enrolled in the UTeach Dallas program. As of May 31, 2013, 43 certified teachers had graduated from the program, including 10 who received middle school certification. All UTeach Dallas graduates who have sought teaching employment have been hired and are teaching in local middle or high school classrooms. Beginning in 2013–2014, UTD anticipates graduating 50 new teachers each academic year, with approximately 25 percent seeking middle school certification annually.

Since the UTeach Dallas program is still relatively young, limited data on placement and retention rates are available. But nationally about 88 percent of UTeach graduates enter the field of teaching, and five years later more than 80 percent are still teaching. To determine the overall impact of the Dallas program, we will be monitoring the number of UTeach graduates placed in teaching positions as well as retention rates and teacher effectiveness (as measured by student performance).
Middle School Teacher and School Leader Professional Development Grants

_The Teaching Trust_. The Teaching Trust has selected the highest leverage aspects of its Aspiring Principals program to create a multiphase professional development Executive Education Program for Teams, a program designed to serve existing principals and their school leadership teams. The goal of the program is to provide high-quality professional development to existing school leadership teams in order to improve the culture of learning, teacher effectiveness, and student achievement on their campuses.

CFT provided grant funds to support the planning and design of the program in 2012–2013, as well as funds to support piloting the program with an inaugural cohort of 12 school leadership teams (from five middle schools) from Dallas ISD during the 2013–2014 school year. The program includes a series of workshops over 10 months, based on curriculum and experiences derived from the Aspiring Principals program. The workshops are connected by action-learning projects to embed the training on school campuses, with accountability through a monthly consultation with Teaching Trust staff. Content topics include Building a High Aspirations Culture, Using Data to Drive Performance, and Supervising and Evaluating Effective Instruction.

Program effectiveness and outcomes will be measured through student achievement gains and culture surveys. Teaching Trust’s goal is for 90 percent of participating teams to demonstrate year-over-year positive gains that exceed those of comparable schools in reading and math, and for 90 percent of participating teams to achieve top-quartile results on culture surveys administered at the end of each program year.

_Teach for America (TFA)_.

In response to CFT’s middle school funding opportunity, TFA proposed to implement an innovative Middle School Partnership Plan (MSPP) at DISD’s Ann Richards Middle School, a new school that opened in Pleasant Grove in fall 2012. As part of the MSPP pilot, TFA placed a high concentration of its corps members at the school—about one quarter of the school’s teaching positions—and it provided extensive professional development to school leadership and non-TFA teachers using TFA’s proven practices and tools. With CFT’s funding, TFA is providing up to 40 hours of high-quality training, programming, and ongoing support to the entire school leadership/administrative team and teaching staff throughout the school year. This includes access to TFA’s Student Academic Achievement Tracker software and online resource bank of curriculum materials, along with its video library of teaching tools.

The pilot program is having a direct impact on all 50 teachers and approximately 1,000 students at Ann Richards Middle School. By June 2014, TFA’s goal is for this school to be recognized as being in the top half or higher among DISD schools, as measured by the School Effectiveness Index. If the model ultimately proves successful, the program can be scaled to other DISD schools, as well as other school districts across North Texas and the country.

Following the first year of implementation, TFA reported several key learnings that have helped the organization adjust and improve the program going into the pilot’s second year. TFA told us that this model has provided rich opportunities for collaboration and experimentation that have helped them identify best practices for collaborating with principals at all TFA schools—not just those in the MSPP pilot. The program has also helped TFA staff work through challenges related to already existing demands on non-TFA teachers’ time and attention. To this end, TFA has determined that objectives for professional development in year two of the pilot should hinge less on the quantity of hours offered and more on offering the content and best practices that are most relevant to the needs of the schools they are serving.

_Big Thought_. CFT’s funding has allowed Big Thought to create and implement a Teaching Artistry Fellowship program—a two-year professional development course and practicum in which 10 master teachers (referred to as Fellows) are learning and applying best practices as mentors and coaches for teachers and community
educators serving Dallas ISD. In the first year, Fellows worked through a program of academic study in the areas of interdisciplinary arts integration, best practice analysis and evaluation, curriculum design, individual and group projects, and management and leadership practices—all with the goal of boosting student engagement. The aim in year two is to exponentially expand the Fellows’ impact across ISD and the community by broadly sharing their knowledge with a larger corps of teachers, teaching artists, and community instructors. Such dissemination of academic and practical knowledge will occur through quarterly teaching artistry labs, the development of an arts-integrated curriculum for specific ages/grades/subjects, and a series of public forum creative conversations.

During Big Thought’s first year, the 10 Fellows were trained to provide on-site coaching and mentoring to 120 Thriving Minds (Big Thought’s summer and after school program) faculty at 38 DISD campuses, representing eight middle schools and 30 elementary schools. The program is expected to impact approximately 8,000 middle school students. During the 2013–14 school year, program Fellows are expected to reach 1,200 teachers, including approximately 400 who serve middle school students.

How will the program measure impact? Through the Fellowship program, Big Thought hopes to drive changes in the instructional practice of its Thriving Minds faculty, as measured by quality and engagement ratings using Big Thought’s Six Dimensions of Quality Teaching & Learning rubric. The organization will also be measuring the impact of the program on student achievement by analyzing course grades, test scores, and matriculation rates.

**Plano ISD Education Foundation.** In 2006, Plano ISD adopted the nationally recognized Advancement via Individual Determination (AVID) program, which includes specialized classes that support the instructional needs of at-risk students. Because AVID has had such positive results, the district has implemented AVID teaching strategies across multiple grade levels in both Plano’s high-needs middle schools and its corresponding elementary feeder schools.

Building on the AVID training that seventh and eighth-grade teachers at Plano’s six highest-need Title I middle schools receive, CFT’s grant funds are being used to provide intensive professional development for sixth-grade teachers at these schools. Teachers receive training during the summer in the research-based AVID program, which incorporates best-practice teaching strategies, study skills, and a culture of high expectations, with a focus on student academic success. Lead teachers on the six middle school campuses provide ongoing training and coaching for the newly trained sixth-grade teachers. Campus AVID coordinators also monitor the integration of skills and strategies in sixth-grade classrooms and across campuses.

Plano ISD anticipates that whole-school AVID training will ultimately have a positive impact on student achievement. To determine the impact of AVID at these schools, Plano ISD will be looking for year-over-year improvements in student scores on the district’s Measures of Academic Progress (MAP) testing, as well as improvements in overall school performance on state STAAR tests.

**National Alliance for Partnerships in Equity Education Foundation (NAPE).** Funding from CFT allowed NAPE to convene a team of Dallas-based middle school teachers and an instructional designer to revise and enhance NAPE’s existing professional development program for high school teachers to serve the unique needs of middle school teachers. NAPE’s curriculum—Micromessaging to Reach and Teach Every Student—is based on the highly successful gender equity STEM program developed by the Women of Texas Instruments. Offered in Dallas ISD and Plano ISD for the last eight years, NAPE’s high school professional development program has achieved statistically significant results in STEM classes in the areas of recruiting, retaining, and improving the performance of girls and minority students as well as boys.

With the updates to the curriculum complete, NAPE is piloting the program with 50 Dallas ISD middle school math and science teachers during the 2013-2014 school year. NAPE is partnering with the University of Texas at Dallas Center for STEM Education and Research (C-SER) to provide observation and coaching support to schools and teachers during this pilot year.
The impact of the pilot on student achievement is being measured through improvements in course grades, changes in course selection behavior, standardized test scores, and AP test-taking and pass rates.

**University of Texas at Dallas, Center for BrainHealth.** CFT funding is supporting the creation of a Strategic Memory Advanced Reasoning Training (or SMART) Community at Thomas A. Edison Middle Learning Center in West Dallas. SMART was developed by the Center for BrainHealth to teach students how to develop and use cognitive processes to learn and think strategically, with the goal of teaching kids how to learn rather than what to learn. By optimizing adolescent brain development and functioning across an entire school campus, the SMART Community at Edison is intended to serve as a model for improving teacher practices and enhancing student engagement and achievement.

The Center for BrainHealth is also providing ongoing professional development, leadership workshops, and in-classroom support to ensure that students and faculty receive reinforcement of brain-based learning. The Center is also providing evening training for parents that is designed to assist them in supporting their children’s cognitive development.

To evaluate the impact of the program, the Center for BrainHealth will be looking for improvements in student reasoning, as measured by pre- and post-assessments using the Scale of Advanced Reasoning. Improvements in student achievement will be evaluated through standardized test scores and end-of-course assessments.

**Uplift Education.** CFT grant funds are being used to create and implement a High School Readiness program to address current gaps in the achievement of Uplift’s middle school students. The Dallas-based charter management organization operates nine middle schools that serve nearly 4,000 students in grades 6 through 8 during the 2013–14 school year.

The coordinated High School Readiness program includes developing curriculum that is sequenced to state and national standards for high school success, tailoring and refining existing curriculum materials to help students move from basic skills to more in-depth content and critical thinking, providing additional middle-school-specific professional development for teachers, training teachers in a best-practice data-driven instruction model, identifying students in need of additional support, providing early interventions, and creating lab classrooms to demonstrate models of successful teaching practices.

Ultimately, Uplift’s goal is to link middle school curriculum and instructional methods to data on what drives student success in high school. When the program is successfully implemented, it hopes to achieve these outcomes:

- Forty-five percent of students in the bottom two quintiles of performance in fall 2013 will meet 1.5 times their personal goals for the year, as measured by Uplift’s MAP assessments (up from the current rate of 26 percent).
- Seventy percent of eighth-graders (who have been at Uplift for three years) will be on grade level in reading by 2015–16 (up from the current 58 percent).
- Seventy-five percent of eighth-graders (who have been at Uplift for three years) will be on grade level in math by 2015–16 (up from the current 68 percent).

**KIPP DFW.** CFT awarded a planning grant to KIPP DFW to partner with Southern Methodist University’s Simmons School of Education and Human Development in order to explore the possibility of establishing a professional development school in conjunction with KIPP’s teacher residency program. By creating a professional development school, KIPP can fulfill its goal of providing a robust learning environment that prepares teacher candidates and emerging school leaders for real urban school settings.

With CFT’s funding, KIPP engaged an Education Pioneer Fellow to do an in-depth needs assessment, research best practices, and develop a strategic plan for implementing a teacher-residency program and professional development
school. Because of a change in executive leadership shortly after the plan was completed, implementation was put on hold. KIPP’s new executive director continues to evaluate the possibility of creating a residency program, along with other opportunities to partner with SMU.

Results, Learning, and Refinement

What has happened, what have we learned, and how can we refine this community impact in Year 2? Most of CFT’s middle school grantees completed their first year of program implementation in the summer of 2013. Data are still being collected and analyzed, so it is still too early for us to draw any definite conclusions from our initial grants. But we can report that nearly all our grantees have made some modifications to their programs based on learnings over the last 18 months. Although we do expect to see incremental gains in student achievement year over year, we also know that ours is a long-term investment strategy and that significant progress will not happen overnight—or within a single year.

One outcome we didn’t anticipate from our middle school grantmaking strategy was the opportunity for us to facilitate collaboration among our grantees. Most of the organizations we are supporting knew of each other, but somewhat surprisingly, relatively few of them had worked together, and even fewer had formed meaningful partnerships. In early 2013, CFT staff invited all of our middle school grantees to join us for a conversational lunch at the foundation to help foster better communication, connectivity, and opportunities for organic collaboration. All the organizations were asked to make a brief presentation highlighting their CFT-funded programs. Following presentations, their peers asked questions about their work. At the end of the luncheon, we encouraged grantees to continue the conversations initiated that day and offered a special opportunity to seek additional funding from CFT for collaborative projects related to training, preparation, and professional development for middle school teachers and leaders.

In our spring 2013 middle school grant application cycle, we received three collaborative proposals—two involving partnerships among organizations that had never worked together before and that have since been funded by CFT. Big Thought and KIPP DFW received collaborative funding to create and implement a year-long professional development program designed to support the delivery of in-school arts integration and after school creative learning enrichment opportunities not previously offered at KIPP Truth Academy. In a separate grant, UTD’s UTeach program is now working with NAPE to provide gender equity training to pre-service teachers, something NAPE has never done. A second grantee convening is planned for spring 2014, and CFT looks forward to many more opportunities to foster dialogue and collaboration among our Community Impact grantees as we continue our middle school investment strategy.
Community Impact Funding: Economic Security for the Working Poor

Program Context

In 2009, CFT trustees selected Economic Security for the Working Poor as CFT’s Community Impact area for discretionary funding, with the goal of improving the economic security and stability of working families living at and above the poverty line. Achieving this goal first meant helping the community better understand the current issues and challenges facing the working poor and then convening and aligning service providers (as CFT’s greatest point of leverage) to address these issues and challenges.

In that context, the board selected the following strategies in June 2010 for discretionary funding of economic security for the working poor:

- Fund the Corporation for Enterprise Development (CFED) to produce an Assets & Opportunities Profile for Dallas to educate and build excitement about the role of data in understanding the city’s key issues.
- Provide training and coaching grants to individual agencies and foundations to facilitate application of CFED profile data and other data to their programming and strategy.
- Convene stakeholders to review data and discuss new insights into the issues facing the working poor.
- Fund the compilation of additional existing data and the collection of new local panel research.
- Use data to identify working poor program areas for CFT grantmaking.
Activities

Fund CFED to Produce an Assets & Opportunities Profile for Dallas

At the end of 2011, CFT contracted with CFED to produce an Assets & Opportunity Profile for Dallas in conjunction with the Thomson Family Foundation. The profile, released in February 2012, helped the community better understand wealth, poverty and opportunity across the City of Dallas, Dallas County, and the 12-county North Texas region. Although many believed that the North Texas region has relatively high income levels, the report showed that the region’s poverty level is worse than the national average. Not only does financial insecurity destabilize families, but it also jeopardizes the long-term vitality of cities and local economies, making the report relevant on multiple levels.

Demand for the CFED profile was much greater than anticipated. More than 300 nonprofits, funders, and media attended a press release about the profile, resulting in multiple media stories and editorials, including articles in The Dallas Morning News, Dallas Business Journal, and the Observer; as well as coverage on the local NBC affiliate.

The Assets & Opportunity Profile for Dallas was also presented to a group of 30 legislators and/or their staff members from city, county, state and federal offices, all of whom showed great interest in having CFT provide regular updates on related issues in this way. Based on the enthusiasm about the initial release and the feedback from nonprofit organizations serving the working poor, CFT created an additional, longer nonprofit convening in March 2012 where more than 200 nonprofit representatives had the opportunity to dive deeper into the data contained in the profile.
Provide Training and Coaching Grants to Individual Agencies and Foundations on Applying the CFED Profile Data and Other Data

To further support the nonprofit community in addressing the findings of the study, the Philanthropy Department staff launched a pilot program in 2012–13, called the Data Driven Decision-Making (D3) Institute, to provide organizations offering programs and services for low-income families the power to accelerate the development of enhanced solutions to their clients’ social and economic problems.

The Institute was designed to provide an opportunity for organizations to accomplish the following:

- Develop a shared understanding of the current issues and areas of need for low-income families, based on currently available data.
- Implement and/or expand the use of data in strategic decision-making and as a part of program development.
- Expand participants’ (and CFT’s) network of resources and support, including sharing best practices through participation in a learning community.

The institute consisted of learning opportunities for personnel at all levels of participating organizations, including leadership and program staff. An initial cohort group of 16 nonprofits was selected in July 2012 through a competitive grant process, with each asked to make a 12-month commitment to program participation.

The selected agencies participated in a series of workshops focused on using and applying data and were provided with up to 40 hours of one-on-one coaching on the use of data and evaluation to inform decision-making. Monthly workshops also provided time for networking and relationship-building between agencies.

Grantees were also allocated an initial general operating grant award of $10,000 per organization in appreciation of the time and effort involved in their participation (paid in three installments, contingent upon attendance).

Finally, all participating agencies worked on at least one collaborative group project and were given the opportunity to apply for additional working-poor-specific program grants based on the output of the project work.

Convene Stakeholders to Review Data and Discuss New Insights into the Issues Facing the Working Poor

CFT’s initial efforts to convene stakeholders to discuss working poor issues at the start of 2012 were wholly CFT-planned and initiated, and CFT hosted conversations to capitalize on the release of the CFED report. However, the interest in and enthusiasm about the data very quickly and organically drew a group of particularly interested funders together to organize a continued series of meetings to continue conversations about working-poor issues. These efforts were supported generously through the loan of a local staff person by the Asset Funders Network, whose role was to help the group organize and execute plans. This group—which at the close of 2013 included Chase Bank, Citibank, CFT, the Dallas Women’s Foundation, the Federal Reserve Bank, the Meadows Foundation, the Thomson Family Foundation, and United Way in both Dallas and Tarrant counties—became the North Texas Funder’s Forum Steering Committee. Its goals are as follows:

- Provide opportunities for local funders to share their intellectual capital and expertise in the area of economic stability throughout the year and engage in discussions about challenges, successes, and learnings to date.
- Provide, in the form of educational workshops for funders and nonprofits, at least four promising approaches that could be leveraged in North Texas.
• Begin harvesting actionable new grant investment opportunities for funders.
• Identify and commit to the next steps needed to maintain momentum toward strategic action, and support new investments in order to maximize positive impact.

The objectives and desired outcomes were fourfold: (1) enable participants to gather ideas and obtain new insights, tools, resources, and contacts to leverage, advance, and accelerate their organizations’ efforts; (2) increase collaboration and integrated strategies among grant makers; (3) increase grant investment related to nonprofit support of economic stability for working families in the region, increasing the number of participating funders at the table where possible; and (4) elevate and illuminate funder efforts and positive community impact through national partners and forums.

At the urging of CFT, the North Texas Funders Forum’s (NTFF’s) scope was widened to include practitioners as well, for parallel learning in order to lift the knowledge of both funders and the eventual program executors. Four learning events were held between November 2012 and November 2013, engaging approximately 40 grantmakers and 175+ nonprofit practitioners: Economic Mobility (November 2012); A Fighting Chance (March 2013); Financial Capability (June 2013); and Financial Coaching (November 2013).

Additionally, funders on the NTFF’s steering committee are now exploring the idea of future collaboration on programs such as providing alternatives to payday loans and lending circles to DFW; providing additional best practice financial coaching, training, and implementation to local providers; and piloting the Annie E. Casey Foundation’s Center for Working Families model in Dallas.

At the end of 2012, CFT, the Thomson Family Foundation, and the United Way of Metropolitan Dallas agreed to co-fund continued staff support from the Asset Funders Network, with the other steering committee members indicating their interest in providing similar support in future years on a potentially rotating basis.

Fund the Compiling of Additional Existing Data and the Collection of New, Local Panel Research

One of CFT’s assumptions in June 2010, which proved to be at least incorrect in its assumed timing, was that CFT would need to fund, in fairly short order, new and deeper-level data following the CFED report release in order to hold people’s interest, keep them engaged, and continue to draw funders and nonprofits together to work on
key issues. Given that these three things happened organically in both a fairly immediate and sustained way—and continue as of this report’s print date—the strategic decision was made to not yet fund additional research. CFT’s time and money were assessed to be better spent in the short term invested in “live and thriving” local convening and education activities (such as the D3 Institute and the NTFF) as long as good data are available elsewhere to direct the foundation’s efforts and learnings. This strategy will be revisited regularly as factors change.

Use Data to Identify Working Poor Program Areas for CFT Grantmaking

One of the critical objectives for the working poor program area is to directly fund programs and activities that will support working families and help them move toward financial independence. The selection of what to fund needed to be based on evidence and data that showed that the programs were having their intended impact. As stated previously, it was a key assumption of the D3 Institute that through this process, CFT would be able to identify potential programs and services for funding consideration or that the projects created would yield funding opportunities. Though these were possibilities, CFT also recognized the need to look at best practices in similar communities.

Since 2012, CFT staff has been actively engaged in reviewing research and data from other communities, including attending conferences and seminars. As a result, the recommendations for CFT’s funding approach has been formed. One of the best practices that emerged was the model for Integrated Service Delivery, based on work developed by the Annie E. Casey Foundation as the Center for Working Families model in the early 2000s. This model has since been implemented in more than 70 locations and 30 cities across the nation. CFT staff first learned of this model in 2012 at the Asset Funders Network and CFED conferences.

In early 2013, CFT staff furthered their understanding of the model by visiting Cincinnati and Houston to tour multiple sites that have successfully implemented the Casey model. In late 2013, the Center for Working Families Success Network was established as a national network of funders, providers, and intermediaries to support widespread implementation of integrated service delivery as an approach to assisting low-income families. The network hosted its first national conference in Detroit, which CFT staff both attended and funded three local nonprofit providers to attend. At this conference, CFT toured a Detroit site and met with providers and funders that have been supporting this work in their communities.

The model for integrated service delivery that CFT will pilot in 2014 provides a framework for delivering key services and financial support to low-income families by using an integrated approach specifically designed to make it easy for low-income families to obtain critically needed work and support services. The model is built on the concept that offering integrated services in an intentional and thoughtful way will maximize clients’ ability to overcome barriers and advance economically. The model includes a “bundled” set of three core services (see box on previous page), with a goal of helping clients overcome barriers and advance economically.

The model is not a stand-alone program; rather, it is an approach that is overlaid on a provider’s existing programs, staffing structure, and client base. Services are bundled and sequenced rather than being offered as one component in isolation. Providers must intentionally integrate these three key areas in a seamless way for clients and must develop strong long-term relationships with clients. Coaching, which is provided as an integral component, is used to help clients set goals, develop plans, and change behavior. Data on clients and their outcomes are routinely collected and analyzed and are used regularly to make decisions about improving performance and adjusting operations to further support clients in maintaining long-term success.

The evidence for this model is very promising, as documented in the Working Family Success Network’s A Successful Strategy for Promoting Financial Stability. One study found that participants who received integrated services were three to four times more likely to achieve major economic outcomes—getting out of debt, purchasing a car, getting a job, completing training or certification—than those whose services were not bundled. Participants with the
greatest success also received more intensive services. Another study showed that clients who received bundled services saw larger income gains—an average of $1,752 in additional annual income—than those who did not receive these services. Also, a 2012 review of data on existing sites shows that clients who received bundled services saw their net income increase and their credit scores improve—both of which are key metrics of economic progress. There is also growing evidence from providers that the cost of using this strategy decreases over time because of increased enrollments and program efficiency, both of which increase the impact of investments. At one integrated service delivery site in Baltimore, the annual cost per client for services decreased from $2,280 in the first year to $1,031 in the third year—a 55 percent reduction in cost per client.

In early 2014, CFT received applications from agencies interested in piloting the integrated service delivery framework to help low-income families increase their earnings and income, reduce their financial transaction costs, and generate new wealth for themselves and their communities. Grant funds will be available to nonprofits interested in providing a broad range of employment services, income supports, and financial and asset-building services, whether as a single agency or in tight collaboration with others. Selected agencies will be assisted via a multi-year grant to grow their agency into a family-friendly venue that provides bundled services leading to increased economic well-being, and these agencies will be provided significant program guidance, training, and technical assistance to support their adoption of the integrated service delivery model. Grantees will also form a learning cohort—not only to support each other but also to share best practices and key learnings that can be used to further expand the implementation of this model in the North Texas community.

Results, Learning, and Refinement

The evaluation completed by the initial cohort of nonprofits serving the working poor shows that the initial D3 agencies serving this population have benefited from their involvement in the D3 Institute. Though the participating agencies have a basic understanding of the working poor in context of the services and programs these nonprofits deliver, the work of CFT in this funding area has helped establish a broader understanding of the needs and challenges of working poor in the North Texas community. Also, the evaluation finds that organizations that are further along on the spectrum of data driven decision-making are actively providing best practices to less-established organizations, thus helping the larger community that serves the working poor with information needed to shape better services and programs.

The evaluation shows that the agencies most successful in their data driven decision-making exhibit four key characteristics: (1) strong leadership, (2) investment in technology supporting data-gathering and analysis; (3) data-focused personnel; and (4) organizational commitment to data that are informing and driving strategic direction. Evidence of the existence of these characteristics will inform the selection of future cohort groups.

Based on these results, the evaluator recommended CFT consider implementing a pre-D3 seminar for agencies that would help enhance current data collection practices for agencies that may not yet be “ready” for the D3, based on the key characteristics of successful participants. This recommendation was accomplished in 2013–14, with six applicants receiving scholarships to attend The University of Texas at Dallas’ Certificate in Program Design and Development course, hosted by The Institute for Urban Policy.
The table shows some additional recommendations for the upcoming D3 sessions and CFT’s response to them.

**Table 2. Recommendations and CFT Responses**

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<tr>
<th>Recommendation</th>
<th>CFT Response</th>
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<tr>
<td>Consider implementing a Fellows Program for future D3 cohort executives and a Board Fellows Program for D3 agency board leaders. Different options provide organizational commitment/participation from all levels of the key stakeholders in data driven decision-making.</td>
<td>Prior D3 participants will be invited to attend any upcoming sessions and to provide insight and support to the current cohort.</td>
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<tr>
<td>Given that instructors overwhelmingly received excellent evaluations, maintain instructors for the upcoming D3 Institute.</td>
<td>Both instructors have been invited back and are continuing to work collaboratively on the curriculum.</td>
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<tr>
<td>Present a baseline session on defining working poor, followed by intentional presentation of information on the working poor population.</td>
<td>CFT provided to the upcoming cohort an overview of the Asset &amp; Opportunity Profile data. Opportunities to supplement the curriculum with additional information on the working poor will be actively researched.</td>
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<td>Recruit additional coaches with previous nonprofit sector experience (c-level or consultant), coaching, and/or facilitation experience, and a baseline understanding of data application in the nonprofit sector.</td>
<td>For the upcoming cohort, coaches were strategically selected who met the recommended qualifications. Thus two new coaches who are currently nonprofit leaders were recruited.</td>
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<tr>
<td>Implement coach orientation to equip coaches with D3 curriculum and tools/techniques for onboarding and coaching D3 agencies. The toolbox should include, but not be limited to, agency baseline assessment, the D3 Institute syllabus, agency contacts, 101 coaching tips and techniques, and an agency D3 application.</td>
<td>An orientation for Q3 2013 to support the coaches for the 2013-2014 D3 cohort.</td>
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<tr>
<td>Delay coaching support to agencies until the second quarter of D3. Agencies require time to absorb foundational elements of data collection, analysis, and application to select a project, program, or training opportunity to best utilize the coach.</td>
<td>Coaches will not be assigned to their agencies until midway through the upcoming D3; agencies will still be given time to use their assigned 40 hours, with the ability to continue to work with their assigned coach for up to four months after D3 sessions have ended.</td>
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Although the Asset & Opportunity Profile and the D3 Institute have been successful in supporting agencies that serve low-income families, CFT understands much work still needs to be done in the sector. Through its power as a convener, CFT is supporting the sector in not only developing a shared understanding of the current issues and areas of need that are facing the working poor by providing information and data, but also shaping the conversation in the community about the realities and struggles of these families.

Additionally, by expanding the D3 participants’ (and CFT’s) network of resources and support, including sharing best practices through participation in a learning community, CFT anticipates program delivery and services will be stronger as a result of the relationships and connections developed after the completion of the Institute’s formal sessions. The long-term impact of the network will need further study to determine its long-term effect on clients as well as the sector.
Better understanding of the working poor. Recognizing the need to improve the economic security and stability of working families living at and above the poverty line, CFT trustees in 2009 selected Economic Security of the Working Poor for discretionary funding in its Community Impact Grant area. The goal was to first help the community better understand the current issues and challenges the working poor face and then convene and align service providers as CFT’s greatest point of leverage. FSG Social Impact Advisors was engaged in the summer of 2010 to review and assess the Dallas landscape to identify the best areas of entry for CFT involvement and funding. FSG found that very few funders concentrate on the working poor and that the available data on this population locally were limited and out of date. FSG also identified a need for capacity building to help nonprofits learn how to best apply data, when made available, within their organizations, and to eventually develop shared measures across the nonprofit community.

At the end of 2011, CFT contracted with the Corporation for Enterprise Development (CFED) to produce an Assets & Opportunity Profile for Dallas in conjunction with the Thomson Family Foundation. The profile, released in February 2012, provided the community with a better understanding of wealth, poverty, and opportunity across the City of Dallas, Dallas County, and the 12-county North Texas region. Contrary to common perceptions of North Texas’ relatively high income levels, the report showed that the region’s poverty is worse than the national average and that financial insecurity both destabilizes families and jeopardizes the long-term vitality of cities and local economies, making the report relevant on multiple levels.

Leveraging the study’s findings: the D3 Institute. To support the nonprofit community in addressing the findings of the study as well as the need for capacity building, CFT launched a pilot program in 2012 called the Data Driven Decision-Making (D3) Institute to provide organizations offering programs and services for low-income families the power to accelerate the development of enhanced solutions to the social and economic problems facing their clients. The D3 Institute was designed so that organizations could accomplish the following:

- Develop a shared understanding of the current issues and areas of need for low-income families, based on current available data
- Implement and/or expand the use of data in strategic decision-making and as a part of program development
- Expand participants’ (and CFT’s) network of resources and support, including sharing best practices through participation in a learning community

The institute consisted of learning opportunities for personnel at all levels of participating organizations, including leadership and program staff. An initial cohort of 16 nonprofits was selected in July 2012 through a competitive application process, and each agency was asked to make a 12-month commitment to program participation.
Case Study: Data Driven Decision-Making (D3) Institute, continued

The selected agencies participated in a series of workshops focused on using and applying data and were provided with up to 40 hours of one-on-one coaching on the use of data and evaluation to inform decision-making. Monthly workshops also provided time for networking and relationship-building between agencies. Grantees were also given a general operating grant of $10,000 per organization in appreciation of the time and effort required to participate.

Finally, all agencies participated in at least one collaborative group project and were provided the opportunity to apply for additional working poor specific program grants based on the output of the project work.

Short-term (immediate), intermediate (1-3 years), and long-term (5+ years) outcomes were defined to identify and track the impact on nonprofits, with an assumption that by increasing the capacity and effectiveness of agencies that serve the working poor, individual clients would ultimately benefit through the application of better services.

**What impact has the D3 Institute had on participants?** The intended outcomes for Institute participants were identified as follows:

- Develop an understanding of key data/evaluation terms
- Increase participants’ appreciation of the value of data, and better understand how they can use data to inform programming and strategic planning
- Become part of a learning community through participation in the institute
- Increase awareness of cross-sector needs of, and gaps in service to, the working poor.

Overwhelmingly the participants and their executive leadership reported great value in the D3 Institute. The curriculum benefited individual participants directly and made a positive impact on their organizations when information was shared with other staff. Final surveys show that the

<table>
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<tr>
<th>Short-term outcomes</th>
<th>Intermediate outcomes</th>
<th>Long-term outcomes</th>
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<td>Increase value of data among funders and providers.</td>
<td>Shifts in programming investments based on better understanding of data.</td>
<td>Working poor lived are improved through an increase in data-driven relevance of programs.</td>
</tr>
<tr>
<td>Increase understanding of needs/gaps among funders and providers.</td>
<td>Funders expect grantees to use data to guide programs/grant requests.</td>
<td>A culture of evaluation and shared measurement exists among Dallas’ working poor stakeholders.</td>
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<td>Experiential/qualitative input from providers and funders (e.g., level of appreciation for data).</td>
<td>Funders and providers know how to apply data to determine their programmatic priorities.</td>
<td></td>
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<tr>
<td>Providers know how to apply data to programs.</td>
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participating agencies progressed from “occasionally” using data (baseline survey) to “regularly” using data—a notable shift in self-reported behavior from the beginning of D3. Participants also reported a shift in behavior in the collection of large amounts of insignificant data, moving toward a more focused approach to collecting and using data that informs strategic direction in program development, formation and evaluation of collaborative partnerships, and program service implementation.

While D3 Institute participants and coaches reported the Institute needed more emphasis on the specific needs/gaps of the working poor, more than half of the participating agency executives reported a heightened awareness of the need to explore agency impact on serving the working poor community as a whole, versus serving with singularly focused programming, with seven of the agencies currently pursuing and building stronger collaborations with other D3 agencies to support gaps in services.

“We were surprised by how well our very different organizations came together to work on a common challenge. It was unclear at first how we could all come up with one idea to address our challenges, but through collaboration and communication, we were able to create something that addressed the root of our challenges.” – D3 Participant

What did we learn, and what is the path forward? In reviewing the outcomes and evaluations from the initial cohort of nonprofits, CFT found that organizations that are further along on the spectrum of data driven decision-making are more likely to be actively providing best practices in programming and collecting and using data than less-established organizations. As a result, these organizations are serving the broader community that serves the working poor with information that can be used to shape better services and programs. The evaluation further showed that agencies that are most successful in data driven decision-making exhibit four key characteristics: (1) strong leadership, (2) investment in technology that supports data gathering and analysis, (3) data-focused personnel, and (4) organizational commitment to using data to inform and drive strategic direction. This will be key information to consider when selecting future cohort groups.

Furthermore, CFT implemented a pre-D3 seminar in 2013 for agencies not yet ready for the D3 Institute, to enhance their current data-collection practices. It is too early to see whether this intervention was effective in preparing agencies for potential selection in the upcoming 2014 cohort.

Also, while CFT was evaluating and tracking for the above outcomes, several unplanned outcomes surfaced, which further reinforce the soundness of the D3 Institute in supporting nonprofits by developing their capacity related to the use of data and evaluation:

- **Future Institute Opportunities**—CFT has been approached by other sectors to conduct a D3 Institute for their constituents. This outcome is a direct result of participants sharing
Case Study: Data Driven Decision-Making (D3) Institute, continued

information about the impact of D3 across the Dallas-area nonprofit sector.

• **Increased Trust**—Agencies communicated an increased level of trust being built between fellow D3 agencies as well as within the funding community. Participants reported coming to D3 with a level of “hesitation to share because of competition, but D3 helped to break some of the walls down to move from competitor to compatriot.”

• **Long Term Reporting**—Agencies have started to expand program evaluation—from capturing and analyzing data specific to the impact on individual clients, to the impact on the community. Two D3 agencies supporting home buying for the working poor have reported implementing a long-term strategy to support the future success of clients, by surveying 24 and 36 months post-home purchase and by collecting data to communicate the impact of homeownership on the community. Such data will have long-term benefits to the community as a whole.

• **Promoting CFT as an Innovative Funding Leader**—CFT is one of the only community foundations nationally to fund this type of capacity-building for nonprofits, and as a result CFT is getting speaking requests from national organizations, including the Philanthropy Roundtable and the Asset Funders Network. CFT’s work with the D3 Institute has also been featured in *The Chronicle of Philanthropy*. 
Educate Texas

History

The Texas High School Project (now Educate Texas), was launched in 2003 to address low high school completion rates and increase the number of minority, low-income, and first-generation students graduating from college. The Bill & Melinda Gates Foundation, through major financial support, sought to create a leading organization to spearhead innovative education initiatives. Through conversations with the governor’s office, the Texas Legislature, the Texas Education Agency (TEA), and the Michael and Susan Dell Foundation, this novel public-private initiative was born.

In 2004, the Communities Foundation of Texas offered to serve as the fiscal intermediary and program manager for private philanthropic funds and to launch the effort. No one could have envisioned the full scale and scope of what the “project” would become 10 years later. In 2012, based on the growth of its programs’ mission and focus, the Texas High School Project was rebranded as Educate Texas.

The initial work for Educate Texas focused on high school redesign, charter schools, and a new school model that the Bill & Melinda Gates Foundation supported, known as the Early College High School (ECHS) initiative. The scope of the portfolio expanded when Texas Governor Rick Perry—along with the Bill & Melinda Gates Foundation, CFT, National Instruments, and the Michael & Susan Dell Foundation—created Texas’ Science Technology Education and Math (T-STEM) initiative in 2005. A decade later, 135 campuses serving more than 63,000 students exist across Texas and are exceeding state averages in student achievement, high school graduation and college enrollment.

Educate Texas still operates under the CFT umbrella and is governed by a committee of the CFT board of trustees, currently chaired by former State Senator Florence Shapiro. CFT supports Educate Texas by providing infrastructure funding and key operating and coordination roles.
Program Context

When Educate Texas began, its focus was to make Texas a state and national leader striving to improve college readiness, access, and success for students from low-income, underserved communities. With evolving guidance from its public-private partners, today Educate Texas’ vision, mission, and strategy for achieving greater student success is as follows:

- **Vision**: Strengthen the public and higher education system so that every Texas student is prepared for educational and workforce success.
- **Mission**: Increase postsecondary readiness, access, and success for all students by building partnerships, leading innovation, and scaling practices and policies.
- **Strategy**: Use philanthropic resources and ideas to fuel innovation in the education system, evaluate its efficacy and outcomes, and then work with local/regional partners and public partners to ensure that these effective practices and policies are adopted and scaled.

By implementing this strategy, Educate Texas seeks to identify policies and practices that will dramatically improve student outcomes across four core impact areas: (1) college-ready standards and practices, (2) postsecondary access and success, (3) human-capital strategies, and (4) collective impact.

Activities

Over the last several years, Educate Texas has continued to expand the impact of its historical portfolio of work—as well as launched new initiatives to identify additional areas of opportunity—within its four core impact areas. The level of impact that can be attributed to Educate Texas varies based on the stage of development (i.e., year of implementation) and the degree of influence that Educate Texas has over the work (e.g., direct focus on students in Early College High Schools or T-STEM Academies versus indirect responsibility for implementation). Within its broad portfolio, Educate Texas has programs with clear measures of outcomes—juxtaposed against other programs—and only outputs of effort can be gauged. The following section summarizes the nature of these efforts within the four core impact areas.

**College-Ready Standards and Practices**

To support college-ready standards for all Texas students, Educate Texas is working with practitioners to identify the strategies and practices required to improve the way teaching and learning take place for students. Through its public–private partnership with the Texas Education Agency, Educate Texas has led the creation of 135 ECHS and T-STEM Academies and is exploring additional promising practices to further accelerate student success across a select number of independent school districts. In addition, as students graduate and matriculate to college, Educate Texas is focused on measuring outcomes for postsecondary enrollment today, and with an eye on eventually measuring completion.
Achieving Strong Academic Gains for 63,000 Low-Income Students in High Performing Schools

Through a partnership with the TEA, Educate Texas has seen a 42 percent compounded annual growth rate (CAGR) and has built a portfolio of 135 high schools (58 ECHS, 70 T-STEM Academies, and seven blended T-STEM/ECHS academies). These schools now serve approximately 63,000 students (see Chart A).

![Chart A: Educate Texas Portfolio Growth Over Time](image)

<table>
<thead>
<tr>
<th>Students Served (000s)</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
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<tr>
<td>ECHS</td>
<td>4</td>
<td>4</td>
<td>12</td>
<td>19</td>
<td>41</td>
<td>30</td>
<td>68</td>
<td>82</td>
<td>95</td>
<td>108</td>
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<tr>
<td>Blended</td>
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<td>T-STEM</td>
<td></td>
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</tr>
<tr>
<td>Grand Total</td>
<td>20</td>
<td>4</td>
<td>30</td>
<td>79</td>
<td>121</td>
<td>155</td>
<td>263</td>
<td>327</td>
<td>418</td>
<td>527</td>
</tr>
</tbody>
</table>

The growth of and demand for these programs have been driven by the strong student gains in both increasing college readiness (see Chart B) and sending a greater number of students to postsecondary education (see Chart C).
Chart B: % of Students with Advanced Course/Dual Credit Completion, 2009-2012

- ECHS: 79%
- T-STEM: 62%
- Texas: 27%

Notes: This chart refers to the percent of students in grades 9-12 who receive credit for at least one advanced course, either AP or dual credit. The weighted average is based on ninth-to-twelth-grade enrollment on 104 campuses with 30,686 students from 2009 through 2012. It does not include school within a school (SWS) or schools with less than two years of continuous operation.

Source: TEA: Academic Excellence Indicator System (AEIS) reports, advanced courses, and dual credit completion, 2009-2012.

As a result of the national and local attention these school models have received, a growing number of school districts across Texas districts have shown great interest in implementing these proven practices. Although limited financial resources are available at the state level to support this expansion, Educate Texas is exploring a mix of public funds, philanthropic resources, and fee-for-service options to provide more options to scale and to spread the promising practices of Early College High Schools and T-STEM Academies.
Notes: The weighted average is based on the high school graduate count at 104 campuses with 6,169 high school graduates from 2009 to 2012. It does not include SWS or schools with less than two years of continuous operation.

Source: Texas Higher Education Coordinating Board (THECB). High School Graduates Spring to Fall College Enrollment by High School, 2009-2012.

**District-Wide Implementation of ECHS/STEM Practices.** To broaden the impact and success of the ECHS and T-STEM models beyond individual schools, Educate Texas realized the need to replicate successful strategies across entire school districts and regions. As a result, it has sought federal, state, and local support in order to work with school districts and higher education institutions to design these practices for district-wide adoption. In 2012 Educate Texas began working with districts in the Rio Grande Valley (including Brownsville and the Pharr–San Juan–Alamo ISDs for ECHS) and the Dallas area (Lancaster ISD for T-STEM) to embed these successful college-ready practices in entire districts. Educate Texas is helping these districts build internal capacity within their central offices, engage the community and school board in supporting the strategy, and evaluate existing resources that could be directed to sustaining these efforts. Over the next five years, Educate Texas plans to impact nearly 90,000 students across these three districts annually.

**Blended Learning.** Educate Texas believes that technology can be better utilized to help improve the teaching and learning experience. With the exponential growth of high-quality digital content and the desire by students and teachers to better integrate technology into classroom activities, Educate Texas launched the Texas Technology, Teaching and Innovation Fund (T3IF) in 2012. Through this effort, it engaged Education Elements—the national leader in blended learning—to design a Request for Proposal that would enable districts to think about ways to implement digital resources in teaching and learning experiences. After receiving five proposals and conducting interviews with each district leadership team, Educate Texas selected Coppell ISD (Dallas area) and Spring ISD (Houston area) to support this burgeoning field of practice. See the case study at the end of this section for greater detail on the T3IF initiative.
Postsecondary Access and Success

Based on a report commissioned by the Houston Endowment, entitled *A New Measure for Educational Success in Texas*, only one of five eighth-grade students receives a postsecondary credential after 11 years. This number falls to one in 10 for economically disadvantaged students. Educate Texas’ vision is to ensure that all Texas high school students have the opportunity and resources to enter and succeed in college. To do so, the organization has identified and is promoting policies and practices that are increasing the number of students who enter and complete a technical, two-year or four-year degree.

The highlights of Educate Texas’ work in postsecondary access and success are as follows:

**Texas College Access Network (TxCAN).** To better align and enhance the impact of the more than 1,600 state college access providers, Educate Texas was selected by the National College Access Network (NCAN) to lead the development of TxCAN. Over the past year, Educate Texas has focused on ways to improve postsecondary access for students in two regions—Dallas and San Antonio. To achieve such improvements, a locally led network of partners was established to increase the awareness of existing college-access activities and resources, align the strategic efforts of various stakeholders, and create tools to measure the impact of college-access support efforts.

Through these two regional efforts, Educate Texas has brought together more than 200 organizations to collaborate with one another based on four key areas to postsecondary access: financial aid, college applications, entrance-examination preparation, and parent engagement.

Further, the organization has been working with each community in the following ways to determine how to sustain this work:

- In Dallas, Educate Texas worked with its many access partners to design a plan for transitioning this work to Dallas Commit!, as college access is one of the community indicators for Dallas County. In addition, 10 new districts will become Commit! participants.
- In San Antonio, staff worked with the mayor’s San Antonio 2020 (SA2020) initiative and the San Antonio Educational Partnership to integrate TxCAN into the many efforts that are under way in the city, including the Lumina Diplomas program, Café College, the Financial Aid Advisory Council, and Generation TX.

**Texas Student Success Council.** Building on the planning phase of Completion by Design, which was funded by the Bill & Melinda Gates Foundation, the council has become a crucial part of a statewide effort to increase postsecondary completion and serves to cultivate a receptive environment for postsecondary success policy reform. With community colleges serving an increasing percentage of Texas students—particularly those who are low-income and first-generation—the council’s initial focus is on student-success efforts at these institutions. To assess the opportunities for improvement, members include national experts on student success, statewide leaders representing K-12, higher education, philanthropy, and community leaders representing municipal government, individual school districts and businesses. Members include ex officio members Rep. Dan Branch, Sen. Kel Seliger, Sen. Judith Zaffirini, Commissioner Raymund Paredes of the Texas Higher Education Coordinating Board, and Commissioner Andres Alcantar of the Texas Workforce Commission.

**Persistence and Completion Strategies.** To improve college success rates, Educate Texas has been working with several organizations to identify opportunities for programmatic investments. One example is a new use of private sector developed predictive analytics in higher education to study and better understand student segmentation.

**Student Segmentation.** Institutions have collected vast amounts of student-level data, but few have effectively utilized data systems to target and personalize support and resources. Over the past year, Educate Texas has worked with the Bill & Melinda Gates Foundation on an actionable research initiative that segments the student population based
on students’ underlying needs, motivations, and behaviors. This practice of segmenting a population has proven to be highly effective in improving the retention of customers in the private sector. Given his previous experience in this work, Educate Texas’ Chief Operating Officer George Tang was invited to serve on a national advisory council to shape the development of the segmentation structure and provide ideas for developing programs and more student-centric interventions. After completing this research, Educate Texas will work with the Gates Foundation to use these insights to better support students during their postsecondary experience.

**Human Capital and Teacher Effectiveness**

National and state research confirms an intuitive reality—that one of the most important factors in student achievement is the quality and capacity of the teacher in the classroom. Knowing that teachers, principals, and superintendents are critical in improving Texas education, Educate Texas has focused on developing strategies that enable school systems to attract, train, and retain effective educators. A portfolio of strategies has been established to both inform the policy issues that need to be addressed and the tools and resources required to support teachers who are striving to be more effective.

**Effective Teaching Initiative.** Educate Texas seeks to catalyze and support rigorous instruction and data use in order to increase college readiness rates in Texas. In collaboration with its network of partners, including Texas school districts, teacher preparation organizations, the Texas Education Agency, and the Texas Higher Education Coordinating Board, Educate Texas is focused on the following:

- Defining and implementing a common agenda for effective teaching
- Improving data use and management
- Providing high-quality professional development and teacher feedback
- Sharing innovative human-capital best practices
- Disseminating promising practices to state agencies and policy makers

**Laying the Foundation for Effective Teaching.** Two important projects provided the foundation for The Effective Teaching Initiative:

**The Measuring Effective Teaching (MET) Project.** Launched by the Bill & Melinda Gates Foundation in 2009, MET has a goal of improving the quality of information about effective teaching available to education professionals nationally. Nearly 3,000 teachers in six urban school districts participated, including the Dallas ISD. The purpose of gathering high-quality data about teaching and learning is to provide teachers with better feedback, to personalize professional development, and to support the creation of fair and reliable systems for measuring teacher effectiveness. The MET project resulted in a set of recommendations and principles for effective evaluation. The lessons learned from this ground-breaking project are now informing efforts in districts across the nation and in Texas.

**Texas Teaching Commission.** In December 2011, Educate Texas convened a 17-member commission comprised of teacher representatives, business leaders, and advocacy groups. The commission spent 12 months holistically examining the teacher continuum, including hearing from experts, evaluating research, and participating in a thoughtful dialogue on how to improve and align teacher-effectiveness policy and practice in Texas. The commission’s work culminated with the development of a report - *Recommendations for the Next Generation of Teaching Policy* - that provides legislative, state agency and district level recommendations including, suggestions on how to improve and align various programs and practices already in place.

The MET Project and the Texas Teaching Commission provide research and lessons learned from Texas and across the country that continue to inform Educate Texas’ efforts to support teachers and students. In fact, Educate
Texas has been working with districts across the state to implement high-level instructional strategies to support teachers’ professional development and to increase their effectiveness in the classroom. These strategies include the Common Instructional Framework, Instructional Rounds, Project Based Learning, and the Gates Foundation’s College Ready Tools.

As a result of the work of the Texas Teaching Commission, districts and legislators are interested in piloting strategies and implementing policies that address all aspects of the teaching continuum (e.g., recruiting, preparing, hiring, inducting, evaluating, developing, compensating, retaining). In 2013, during the 83rd legislative session, 11 bills were filed by the Texas Legislature that were either related to or influenced by the commission. Educate Texas is focused on elevating state dialogue in this area, and ensuring that policy changes lead to more resources and to additional support for teachers and students in Texas classrooms.

**Collective Impact**

With data showing that nearly 80 percent of K-12 students stay within their local communities after graduating from high school, establishing greater levels of alignment in K-12, higher education, and workforce pipelines is critical to improving students’ college and career success. The future success of Texas students depends on such effective collaboration, thus explaining why we develop and support initiatives that efficiently provide these types of opportunities to connect K-12, higher education, and workforce environments. The goal of those activities is simple: to ensure that local leaders align resources to define a shared vision, identify common measures of success, assess community and organizational outcomes based on these measures, and accelerate the spread of evidence-based practices.

With the increased attention on concentrating and aligning local resources and strategies, Educate Texas has over time played a critical role in connecting these emerging national practices to state-level efforts. These include, for example, STRIVE National Network, The Aspen Institute, e3 Alliance, All Kids Alliance, and San Antonio 2020. Educate Texas has identified a unique role in both leading and serving communities that are exploring this framework. The plan has been to help facilitate the development of these efforts, provide a set of shared services that each community can access and leverage, share learning from these multiple efforts, and syndicate potential practice/policy opportunities.

Over the past year, Educate Texas has played a key role with Dallas Commit! in the following areas:

- Shaping the Commit! community engagement and rollout strategy
- Enlisting other organizations to participate in Commit! (including a $1.5 million grant from CFT)
- Serving on and leading multiple Commit! advisory groups (including board membership, the Leadership Council, and Support Councils (for Grades 4 -12, Higher Ed Workforce, and Data))
- Elevating Commit! to the success level of other national entities (including an opportunity to present at the annual Philanthropy Roundtable K-12 event and a recommendation to The Aspen Institute to be included in its Opportunity Youth Fund).

**Rio Grande Valley (RGV) Collective Impact—Phase II.** Since May 2012, Educate Texas has helped bring together leadership from four counties in the Rio Grande Valley (Cameron, Hidalgo, Starr and Willacy) to improve the alignment and collaboration of K-12, higher education, and workforce partners entities. This effort is targeting the nearly 500,000 K-12 and higher education students across the region with the following shared vision:

“All RGV learners will achieve a degree or credential that leads to a meaningful career. We will do this by strengthening each step of the educational pipeline; better connecting the pipeline; and aligning community resources to provide the supports learners need to succeed throughout high school and postsecondary in order to pursue a meaningful career in the RGV and beyond.”
Educate Texas was formally selected as the lead backbone organization for RGV Focus. Through this process, Educate Texas formalized the strategic plan for guiding the work.

**Impact**

Over the past 10 years, Educate Texas has led the development and alignment of breakthrough innovations across the state’s K-12, higher education, and workforce pipeline and achieved strong gains in student success.

Over the past decade, ECHS and T-STEM Academies have become Educate Texas’ signature programs. More specifically, as these school models have developed, Educate Texas has reached several significant milestones. In 2004, Educate Texas served 400 students through T-STEM and ECHS. The original goal was to serve 30,000 low-income and minority students by creating 75 ECHS and T-STEM Academies. A decade later, Educate Texas has far exceeded this goal, recording an annual growth rate 95 percent for ECHS and T-STEM Academies student enrollment. Now its public–private college-ready network of schools includes 135 ECHS and T-STEM Academies serving more than 63,000 students. Over the past 10 years, 10,000 primarily underserved students have graduated from these programs. In 2013-14, 78 percent of the students at ECHS and T-STEM academies are from historically under-represented ethnicities, and 73 percent are considered economically disadvantaged.

These programs are changing the lives of students across Texas. Most notably, the ECHS and T-STEM students graduate high school at higher rates than the state average, complete more advanced coursework (twice as many are completing Advanced Placement (AP) or dual-credit courses than other Texas students) and enroll and persist in college at higher rates (16 percent and 21 percent higher, respectively) than the state average.

But with projections suggesting that 60 percent of the nation’s future workforce will require a postsecondary credential by 2020, business as usual will not be good enough to reach the more than five million students across the state. Programmatic and policy changes in the public and higher education system will be required.

Educate Texas will continue to explore promising new models that increase student engagement and outcomes, to pursue efforts that improve teacher and leadership effectiveness, and to explore ways to increase postsecondary access and success. Further, it will continue to build regional and local alignments across education and workforce entities to ensure broader community impact and long-term student success.

In the next decade, Educate Texas is committed to expanding its collaboration with its public and private partners and defining opportunities to innovate, prove, and advance effective policies and practices.
Case Study: Blended Learning and Texas Teaching Technology Innovation Fund (T3IF)

How can learning be improved? According to the research (U.S. Department of Education’s Evaluation of Evidence-Based Practices in Online Learning: A Meta-Analysis and Review of Online Learning Studies, September 2010) learning is improved when instruction is customized and when both students and teachers receive regular feedback on student progress and achievement. “Blended learning”—defined as a formal school-based education program that leverages digital content to provide students with skills and practice—is a promising approach to accomplish this objective. Blended learning, which enables teachers to focus on depth and application of concepts and to teach higher-order thinking, consists of three key features: (1) individualized self-paced instruction for students, (2) differentiated small-group instruction by teachers based on daily or weekly data, and (3) increased efficiency of resource use.

Blended Learning: Leveraging Digital Content for Students
When blended learning is implemented in classrooms, one of three models (as shown in the figure below) helps teachers integrate technology into core instructional time but does so in a way that

<table>
<thead>
<tr>
<th>Classroom Rotation</th>
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<tbody>
<tr>
<td>Student groups rotate between traditional classroom instruction and online instruction in a computer lab or learning lab monitored by an instructional aide rather than a certified teacher.</td>
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<table>
<thead>
<tr>
<th>Lab Rotation</th>
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<tbody>
<tr>
<td>Student groups rotate between traditional classroom instruction and online instruction in a computer lab or learning lab monitored by an instructional aide rather than a certified teacher.</td>
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<table>
<thead>
<tr>
<th>Flex</th>
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<tbody>
<tr>
<td>Students learn primarily online in a brick-and-mortar school. Teachers act as facilitators and provide support.</td>
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</tbody>
</table>
allows teachers to provide students with more personal attention than they would have received in purely online environments.

Blended Learning Models Education Elements
http://educationelements.com/our-services/blended-learning-model-schools

Which of these models or combination(s) of them makes the most sense? With the exponential growth of high-quality digital content and the desire of students and teachers to see how these resources can be better integrated into the classroom, Educate Texas launched the Texas Technology, Teaching and Innovation Fund (T3IF) in October 2012 with three goals aimed at accomplishing the following: (1) identify promising blended-learning practices and models at the school district level, (2) provide opportunities for Texas school districts to learn, plan, and strategically implement technology to improve teaching, and (3) partner with Texas school districts to launch system-wide blended-learning models in their schools in 2014.

To help move ahead on these goals for T3IF, Educate Texas received a planning grant in June 2013 from the Next Generation Learning Challenge (NGLC), a national philanthropic partner that seeks to ensure that each learner has a clear, well-supported pathway to success in college and career by finding, supporting, connecting, and drawing new knowledge from innovators and practitioners, thus creating the technology tools and comprehensive education models that bring about next-generation learning at scale. Educate Texas provided a 100 percent match in funding for this grant with the support of the W.W. Caruth Jr. Foundation at CFT.

With this funding, Educate Texas’ T3IF engaged Education Elements—the national leader in blended learning—to design a request for proposal that districts could use to design the implementation of these robust digital resources into the teaching and learning experience. From the five districts invited to submit proposals—Coppell ISD (North Texas), Rapoport Public Schools (Central Texas), Hays CISD (Central Texas), Spring ISD (Houston-Southeast Texas), and McAllen ISD (Rio Grande Valley)—Educate Texas’ T3IF selected Coppell ISD and Spring ISD for its first pilot efforts to support the burgeoning field of practice of blended learning in multiple schools across those districts, with the goal of beginning in the fall of 2014. Both districts have strong leadership teams and have shown success with past district-wide technology innovations. The figure on the following page shows the demographics of the two schools and their current status in implementing blended learning.

With NGLC serving as the thought and financial partner in Texas, Educate Texas’ T3IF is seeking to demonstrate the viability of traditional school districts as pilot sites for Next Generation learning.

As a result of the WAVE IV planning award, the two district teams participated in the NGLC Conference and received funding to support the planning and T3IF efforts that were under way last fall. The district teams were invited to submit a blended-learning implementation proposal.
Case Study: Blended Learning and Texas Teaching Technology Innovation Fund (T3IF), continued

In December 2013 for one district school, and the T3IF team at Educate Texas is coordinating planning and learning opportunities to help each district develop the strongest proposal possible.

What have we learned so far in this effort? In a new area like blended learning, the expectations, strategies, and tactics for implementation abound, and there is an equally wide range of budgets for hardware, software, and consulting services. Districts are generally new to integrating technology into classrooms and have different levels of staff capacity and fluency with Next Generation/Blended Learning styles and strategies.

Testing Blended Learning Approaches in Two Texas Schools

<table>
<thead>
<tr>
<th>Coppell ISD - North Texas Recognized District</th>
<th>Spring ISD - Houston Area Academically Acceptable District</th>
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<tbody>
<tr>
<td>10 Schools</td>
<td>39 Schools</td>
</tr>
<tr>
<td>Serving 10,000 Students</td>
<td>Serving 36,000 Students</td>
</tr>
<tr>
<td>20% minority, 20% at-risk, 10.3% LSES</td>
<td>88% minority, 46% at-risk, 73% LSES</td>
</tr>
</tbody>
</table>

- Four schools are included in the T3IF Initiative
- Two elementary schools, one middle school, one high school
- 2,000+ students will be directly impacted by T3IF
- **Currently - Fall 2013**
  - i West Middle School
  - Lab Rotation Model
  - Opened with 100 eighth-graders this fall
  - Impacting all core academic areas

- Seven schools are included in the T3IF Initiative
- Four elementary schools, two middle schools, one high school
- 8,000+ students will be directly impacted by T3IF
- **Currently - Fall 2013**
  - Carl Wunsche Career High School
  - Flex Model
  - Began piloting flex schedule
  - Secured a Learning Management System
  - Teachers received training and are building content
Case Study: Blended Learning and Texas Teaching Technology Innovation Fund (T3IF), continued

Through support of the T3IF initiative, Educate Texas has learned that as an organization, we would have benefited from a more discrete and concrete plan for establishing parameters for project scope, depth of integration, and budget options and for communicating these parameters to the two school districts. We inadvertently created different sets of expectations among the districts by asking them to develop a “blue sky” strategy for themselves, as opposed to setting guidelines based on a defined budget range.

Another major lesson learned was how challenging it is to secure local, state, and national philanthropic financial support for Next Generation/Blended Learning projects when they focus on traditional school districts rather than charter-management organizations. It remains a challenge to find those organizations that are interested in supporting Next Generation/Blended Learning on such “traditional” campuses and in school districts in Texas.

What is our focus moving forward? Given the lessons learned and our continued focus on building public school district models to increase the effectiveness and impact of this innovation, Educate Texas’ T3IF is focused on the following moving forward:

- Building the capacity of our internal T3IF team and Texas district leaders to create a comprehensive plan for successful implementation of blended learning in one or more schools in 2014
- Securing strategic philanthropic and corporate partnerships (e.g., with service providers, networks, research and evaluation organizations, funders, and technical-assistance providers) to support the growth of blended learning in Texas
- Exploring the blended-learning needs and practices of schools/districts statewide

Educate Texas is committed to providing opportunities for Texas students and teachers to innovate and explore promising Next Generation/Blended Learning over the next three years.
Case Study: Community Colleges and Student Success

Why are community colleges and student success important? Since 2004, Educate Texas has worked with community colleges and regional universities statewide (such as the University of North Texas and the University of Texas at Brownsville) through the Early College High School (ECHS) initiative, which has grown to 65 campuses serving more than 20,000 students. Over the past three years, Educate Texas has broadened this work to include postsecondary policy and the convening of key stakeholders focused on improving community colleges. Across Texas, the state’s 50 community colleges serve more than 833,000 (53 percent) of all students in public higher education, and they are the preferred gateway to postsecondary education for an even greater percentage of our first-generation, low-income students. Given this, community colleges play a critical role in increasing the state’s educational-attainment goals.

Unfortunately, six-year graduation rates for full- and part-time students currently stand at only 31 percent and 24 percent, respectively. In prior years, Texas had experienced a major schism among community college leaders, some members of the business community, and the executive branch, culminating in the Texas Association of Business (TAB)’s purchase of billboards in Austin and Dallas that highlighted low graduation and completion rates in the Dallas County Community College District and at Austin Community College. If Texas is to remain economically competitive, it clearly must do better in this regard, but improving the situation must go beyond just highlighting the problem; it must focus on a state policy that supports community colleges’ efforts to improve student success.

Educate Texas’ efforts are focused on advocacy in helping to develop this state policy framework, with the goal of serving as a thought partner in and resource for the governor’s office, the lieutenant governor’s office, and key legislative offices on policy issues that move the needle forward on student success.

What has Educate Texas done? In its advocacy role, Educate Texas has worked closely with Senate Higher Education Committee Chair Judith Zaffirini, House Higher Education Committee Chair Dan Branch, and Texas Commissioner of Higher Education Raymund Paredes on House Bill 2910 during the 2011 legislative session. This legislation helps create public/private partnerships to identify and promote innovative models, emerging technology platforms and best practices for increasing degree-completion rates in areas such as developmental education, financial aid, student support services, and transfer/articulation agreements.

Building on that work and our partnership with a group of community colleges striving to dramatically increase completion rates, Educate Texas created the Texas Student Success Council in 2012—which includes state and field stakeholders representing education (K-16), business and labor, and nonprofits and philanthropy groups—to provide a forum for engaging policy stakeholders in increasing postsecondary completion rates, particularly in community colleges. Chaired by Dr. Richard Rhodes (president of Austin Community College), the council helps identify and mitigate
Case Study: Community Colleges and Student Success, continued

policy and funding challenges that are barriers to community-college student success. The focus is on three areas: (1) transfer and articulation, (2) outcomes-based funding, and (3) additional barriers identified by colleges as a hindrance to student success. In these areas the council seeks to adopt policy recommendations for the Texas Legislature that are informed by the work of the colleges and the members’ unique expertise.

Through the council, Educate Texas found common ground among business, philanthropy, community college leaders, the executive branch, and policymakers on important community college policy priorities during the 83rd Texas legislative session. These priorities are shown in the table below.

<table>
<thead>
<tr>
<th>Legislation</th>
<th>Legislator</th>
<th>What the Legislation Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reverse Transfer (SB 498)</td>
<td>Senator Kel Seliger</td>
<td>Reduces the reverse transfer credit threshold from 90 semester credit hours to 66</td>
</tr>
<tr>
<td>Course Numbering System (SB 215)</td>
<td>Senator Brian Birdwell</td>
<td>Requires colleges and universities to submit information annually to the THECB about courses offered that are included in a common course numbering system, increasing the transparency of courses offered by universities in the common course numbering system and planting the seeds for continued work in this area</td>
</tr>
<tr>
<td>Field of Study and Tuning (SB 215)</td>
<td>Senator Brian Birdwell</td>
<td>Requires the THECB to encourage the transferability of lower-division courses, providing statutory support for the THECB to continue its focus on this work</td>
</tr>
<tr>
<td>Student Success Points (SB 1) (the state appropriations bill)</td>
<td>Senator “Tommy” Williams</td>
<td>Allocates 10 percent of state funding for community colleges, based on student success points</td>
</tr>
<tr>
<td>Workforce Innovation Needs (WIN) Program (HB 3662)</td>
<td>Representative Travis Clardy</td>
<td>Creates a pilot program allowing school districts and institutions of higher education to work individually or collectively to innovate in areas that could better meet the needs of students and the workforce. Initially includes competency-based learning and integration of career and technical education into dual-credit pathways, with the expectation that they come back with legislative recommendations based on the pilot work</td>
</tr>
<tr>
<td>New Mathways Project (SB 1)</td>
<td>Senator “Tommy” Williams</td>
<td>Includes $2.4 million over the biennium for the New Mathways Project, which aims to give college students who require remediation access to the math they need to achieve their academic and career goals and enables college students to complete a credit-bearing, transferable mathematics course in one academic year, while simultaneously building skills for long-term success in college and in life</td>
</tr>
</tbody>
</table>
Case Study: Community Colleges and Student Success, continued

What have we learned, and what is our focus moving forward? Although we were pleased to see so many policy changes that will positively impact student success at our institutions of higher education, we recognize that work remains to continue to move the needle. One area of particular interest for the council is continued improvements in the transfer and articulation of credit between two- and four-year institutions. Having focused intently on this issue, we learned a key lesson from this session—that data illustrating the barriers to transfer are critical to telling the story of the problem and making the argument for solutions. Obtaining this data has often been challenging, so we have partnered with the Community College Research Center at Columbia University to produce a policy brief. Having these key points proved incredibly valuable in highlighting the need for solutions. As we move forward with this work, we will continue to keep the use of data at the forefront of our storytelling efforts.
Case Study: Effective Teaching and Human Capital in School Districts

Why are teacher effectiveness strategies important? National and state research confirms what we already know intuitively—one of the most important variables in student achievement is the quality of the individual teacher in the classroom. Fortunately, Texas is already focusing on developing the “teacher pipeline” to improve teacher quality—teacher recruitment, training, development, and retention—through a range of district and state initiatives, legislative and administrative policies, grant programs, and local traditional and nontraditional K-12 and higher-education efforts. However, with more than 325,000 teachers—the largest percentage of whom have only one to five years of experience—there is much room to improve. Many existing programs, policies, and initiatives operate in isolation, with little alignment or cohesion between state policies and investments and local district implementation, investments, and quality control. Although teachers ask for thoughtful feedback and support, Texas does not even require an annual evaluation of all teachers, and the professional development provided is rarely tailored to the needs of the teacher.

Educate Texas has a multi-year history of working in the area of teacher effectiveness at both the district and higher-education levels statewide. It occupies a unique space, allowing it to convene stakeholders from business, education, and policy to take a holistic look at the teacher continuum in the state and to begin to have thoughtful dialogue on how to improve and align various programs and practices already in place.

What has Educate Texas done? Educate Texas has funded seven colleges of education to build innovative principal preparation programs with their schools of business. Additionally, our organization is undertaking a set of initiatives related to human-capital reform at the district level to help support innovative superintendents to develop and implement new systems of teacher supports. An outgrowth of our program work has been an organizational shift to become more active in the state-policy arena. Over the past two years, we saw a desire for better information and ideas on how to best train, support, evaluate, and compensate our state’s teachers. The 83rd Texas legislative session saw the introduction of several bills related to improving teacher preparation, evaluation, and compensation systems. Unfortunately, many of these proposals are addressed in isolation, without considering the broader effects on the teacher pipeline in Texas.

Beginning in 2011, Educate Texas convened stakeholders from across the public and private sectors—including leaders in K-12 and higher education, business, and philanthropy—to launch the Texas Teaching Commission. The commission’s singular charge: look holistically at the teaching continuum in Texas and recommend strategies for improvement. What emerged was a thoughtful, generative dialogue on how to improve and align various programs and practices already in place and proffer next-generation policy recommendations that can promote dramatic improvements...
Case Study: Effective Teaching and Human Capital in School Districts, continued

In teaching and learning. During the 83rd legislative session, several bills addressed many of the recommendations included in the Teaching Commission report, which are shown in this table.

<table>
<thead>
<tr>
<th>Legislation</th>
<th>Legislator</th>
<th>What the Legislation Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher Preparation, Hiring, Induction, Evaluation, Professional Development, Compensation, and Retention (HB 1751)</td>
<td>Representative Diane Patrick</td>
<td>Creates the Educator Innovator Program that asks districts to develop a plan to improve educator quality and effectiveness, new recruitment, preparation, hiring, induction, evaluation, professional development, strategic compensation and career pathways, and retention practices; makes available $16 million per year of the biennium in competitive dollars for districts.</td>
</tr>
<tr>
<td>Teacher Recruitment and Preparation (HB 1752)</td>
<td>Representative Diane Patrick</td>
<td>Creates a Texas Teacher Residency Program at an institute of higher education where candidates will receive a masters and certification through extensive fieldwork, with teachers certified under the residency program agreeing to teach at hard-to-staff school schools and being eligible for a Texas loan forgiveness grant; makes available $1,298,305 in competitive dollars for a university.</td>
</tr>
<tr>
<td>Teacher Retention, Preparation, Professional Development, Strategic Compensation, and Induction (HB 2012)</td>
<td>Representative Mike Villarreal</td>
<td>Includes a variety of teacher-quality recommendations from the Texas Teaching Commission, including (1) providing salary collection and analysis, (2) creating a teaching- and working- conditions survey, (3) requiring that additional information be provided to teacher candidates in regard to skills necessary to be a successful educator, educator supply and demand, classroom-management skills, and evaluation information, (4) setting admission requirements for educator preparation programs, (5) requiring minimum scores for core areas on the generalist teacher exam, (6) requiring more frequent observation and walk-throughs, (7) requiring professional development audits, and (8) providing mentor release time for teacher mentors and amending Senator Patrick’s SB 1403.</td>
</tr>
<tr>
<td>Teacher Recruitment and Retention (SB 1720)</td>
<td>Senator Dan Patrick</td>
<td>Creates a Math and Science Scholars Loan Repayment Program for undergraduate students who agree to teach in Title I school districts in Texas that have shortages of mathematics and/or science teachers.</td>
</tr>
<tr>
<td>Teacher Preparation (HB 2318)</td>
<td>Representative Jimmie Don Aycock</td>
<td>Requires additional information be provided to teacher candidates in regards to skills necessary to be a successful educator; educator supply and demand; classroom management skills; and evaluation information; also requires the state to update requirements and standards for all educator preparation programs every five years.</td>
</tr>
</tbody>
</table>
What have we learned, and what is our focus moving forward? This session saw the passage of legislation that provides for continuous improvement of policies that aim to enhance various components of the teacher pipeline. We look forward to supporting the implementation of these bills over the next few years.

This legislative session also provided some critical improvements in and changes to effective teaching policies aimed at strengthening the teaching profession and ultimately increasing student success. A key lesson from this session is that there was a significant lack of understanding regarding the challenges of current teaching policies. Throughout the Texas Teaching Commission’s work and the dialogue with legislators, it was evident that we each define the concerns differently. We hope to continue to highlight the importance of using evaluation systems to provide feedback to teachers to improve their teaching and to identify the classroom support they need. To address this need, we plan to educate and raise awareness among policymakers about the value of improved systems, bringing together various stakeholders to increase understanding. The education focus of this last session was on the changes to the state assessment and high school curriculum requirements and structure, thus allowing for limited attention to and time for other education policies, including those impacting effective teaching.

As partners with the state, Educate Texas will also assist in efforts to implement HB 5 and to ensure that intended rigor and college readiness are maintained as it is rolled out.

Through our work over the past year, we have been working with districts across the state to identify how different instructional strategies (designed by the Bill & Melinda Gates Foundation) could be utilized to support their professional development and increase their effectiveness in the classroom. We are increasingly finding that Texas school districts are interested in seeing how to best pilot strategies and policies that will address all aspects of the teaching continuum (e.g., recruiting, preparing, hiring, inducting, evaluating, developing, compensating, and retaining).
W.W. Caruth, Jr. Foundation

Background

In 1974 W.W. Caruth, Jr. created a charitable trust as a supporting organization of CFT. The W.W. Caruth, Jr. Foundation (“Caruth Foundation”) was principally funded through his estate after his death in 1990. It makes grants that support the charitable mission of CFT by supporting innovative charitable projects in education; public safety; and health, medical, and scientific research.

The foundation’s defining characteristics include an ability and desire to make grants of significant size and to take bigger risks with those investments to support transformational change in the community. Trustees look for bold, entrepreneurial, unique, and creative ideas to solve significant community problems within the three focus areas.

As shown in Figure 1, through December 2013 the Caruth Foundation has awarded numerous grants from its portfolio of almost $145 million, with more than a third going to medical/science research and more than a quarter going to each of the public safety and education areas. As a supporting organization of CFT, the Caruth Foundation also occasionally provides financial support to CFT for strategic initiatives.

Figure 1. Caruth Foundation Approved Grants
Grant Activities

Representative grant activities in the three focus areas (both active and completed), along with the amount and purpose of the grant, are shown in Table 1 below.

*Table 1. Highlighted Caruth Foundation Grant Activities*

<table>
<thead>
<tr>
<th><strong>PUBLIC SAFETY</strong></th>
<th>Grant Recipient</th>
<th>Status</th>
<th>Use of Grant</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cottages at Hickory Crossing</td>
<td>Active</td>
<td>Permanent supportive housing project</td>
<td>$3,500,000</td>
<td></td>
</tr>
<tr>
<td>City of Dallas Police Department (DPD)</td>
<td>Active</td>
<td>Caruth Police Institute (CPI) and equipment for DPD</td>
<td>$15,000,000</td>
<td></td>
</tr>
<tr>
<td>Mass Care Task Force</td>
<td>Completed</td>
<td>Developing and implementing a Mass Care Response and Disaster Relief Plan for North Texas</td>
<td>Up to $5,000,000</td>
<td></td>
</tr>
<tr>
<td>Texas Health Presbyterian Foundation/Dallas Area Rape Crisis Center</td>
<td>Active</td>
<td>Sexual Assault Nurse Examiner program and facility build out</td>
<td>$2,000,000</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>EDUCATION</strong></th>
<th>Grant Recipient</th>
<th>Status</th>
<th>Use of Grant</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southern Methodist University (SMU)/Dedman School of Law</td>
<td>Active</td>
<td>W.W. Caruth, Jr. Child Advocacy Legal Clinic and Institute</td>
<td>Up to $2,500,000</td>
<td></td>
</tr>
<tr>
<td>Commit!2Dallas</td>
<td>Active</td>
<td>Collective Impact model for improving education in Dallas County</td>
<td>Up to $1,500,000</td>
<td></td>
</tr>
<tr>
<td>Dallas County Community College District Foundation (DCCCD)</td>
<td>Active</td>
<td>STEM Institute and Faculty Fellows Program</td>
<td>$1,800,000</td>
<td></td>
</tr>
<tr>
<td>CFT/Educate Texas</td>
<td>Active</td>
<td>Project administration of DCCCD STEM Institute grant</td>
<td>$270,000</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>MEDICAL AND SCIENTIFIC RESEARCH</strong></th>
<th>Grant Recipient</th>
<th>Status</th>
<th>Use of Grant</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s Medical Center Foundation</td>
<td>Active</td>
<td>Support of Children’s Research Institute at UT Southwestern for endowment or general operations</td>
<td>Up to $7,500,000</td>
<td></td>
</tr>
<tr>
<td>American Heart Association, Inc. (SouthWest Affiliate)</td>
<td>Completed</td>
<td>Creation of a Dallas County emergency response system for the coordinated treatment of myocardial infarction</td>
<td>$3,532,580</td>
<td></td>
</tr>
</tbody>
</table>
Public Safety

The Cottages at Hickory Crossing. No permanent supportive housing exists for Dallas’ highest-risk yet treatable, chronic homeless population—those individuals who are mentally ill and have co-occurring addictions and a history of criminal-justice involvement (potentially including felony convictions). Without stable housing and intensive support services, these individuals cycle in and out of Parkland Hospital and the Dallas County Jail, costing taxpayers up to $150,000 annually per person. Such chronically homeless individuals also put a significant strain on City, County, and nonprofit resources, including The Bridge, Dallas’ homeless assistance center.

In response to overcrowding at The Bridge after it opened in 2008, a collaboration of public, private, and nonprofit partners, including the Caruth Foundation, began looking for model programs across the country to serve this challenging population. This effort led to the concept of creating the Cottages at Hickory Crossing—a three-year demonstration project to pilot a best-practices model to address this typically difficult and expensive-to-serve population in a way that helps them return to mental stability, remain off the streets through permanent housing, and stay out of emergency rooms and jails. If it works as designed, the program could save Dallas taxpayers an estimated $140 million over the 30-year life of the real estate and could be a model of support for other cities dealing with this challenging population.

CFT provided the initial $3.5 million of the then-estimated $10 million needed to fund the project, with $2.5 million of that to be used for a 3-to-1 matching challenge grant to attract other funders and $1 million to provide for immediate services, evaluation, and project land acquisition. Partners in the highly collaborative project are:

- Metrocare Services
- CitySquare (formerly Central Dallas Ministries)
- Metro Dallas Homeless Alliance
- University of Texas Southwestern Medical Center
- Dallas County Jail Mental Health Steering Committee
- Central Dallas Community Development Corporation

The permanent supportive housing design for the Cottages at Hickory Crossing project begins by providing a housing-first apartment for 50 single homeless individuals with mental illness and criminal-justice involvement, potentially including felony convictions. Co-located in the complex is a full continuum of 24/7 support and treatment services, including comprehensive case management, psychiatric care, mental-health treatment and support, substance-abuse treatment, life-skills training, and employment counseling. The holistic approach is based on national evidence-based best practice models for successfully serving chronically homeless people with mental illness and addictions. The goal is to improve the well-being of the individuals served, maintain permanent housing, reduce recidivism, and ultimately reduce the use (and funding burden) of public facilities such as emergency rooms, psychiatric hospitals, shelters, and the county jail system.

Of the original $3.5 million committed to the project, $1 million was spent during the initial “immediate relief” phase, including $750,000 to provide services and $250,000 used to evaluate the outcomes of the services provided and to initiate land acquisition for the future Cottages project. The temporary demonstration pilot not only provided immediate relief of overcrowding at The Bridge but also served as a basis for determining clinical and social service needs and site design for the permanent Cottages project. Caruth funding was used for land acquisition, architectural design, and preconstruction work; and for support of the design and implementation of a
rigorous evaluation model for the project developed by UT Southwestern Medical Center. An award-winning project design was created by bcWorkshop for the future Cottages at Hickory Crossing project. Figure 1 shows the concept underlying the project and the artist’s renderings of the cottages and overall space.

Figure 1: Project Model and Artist’s Design Concepts of Cottages from bcWorkshop

From the project’s beginning, fundraising has been challenging because of the unanticipated economic downturn that began in 2008, and often-competing funding requests related to other needs from the various partners. However, recent efforts by the project partners have identified the funding required to complete the project. Work is currently under way to complete all preconstruction-related requirements in order to begin construction by April 2014.

The following additional funding for the project has been secured:

- **City of Dallas**: $1,500,000 for construction, with funding documents under development—an additional $1,000,000 beyond the $500,000 committed early in the project.

- **Dallas County**: $1,000,000 for preconstruction costs, acquisition of the last land parcel in the development, and construction costs. This funding was authorized by the Commissioners Court, Order Number 2013-1143. The contract to convey the Dallas County funding has been developed, with final contract execution anticipated in March 2014.

- **Private Donor**: $2,000,000 for any project costs. City Square secured this significant commitment from a long-time supporter.

- **Churches**: $350,000 for any project costs. City Square has secured multiple funding commitments from churches.

- **Dallas Housing Authority**: $2,400,000 for 50 tenant-based housing vouchers, which are valued based on a five-year commitment at $800 per month per unit.
This additional funding, along with previous funding commitments and access to remaining Caruth Foundation matching funds, will allow construction to begin. The cost of construction, including costs already incurred and costs to be incurred during the first two years of operation, is $8,186,948. Some of the construction costs are being finalized. All estimates have been conservative, and some reduction in final expenses is expected. Current projections are that an additional $200,000 will be needed to fully fund operations for the initial two years. As currently projected, the overall project budget is $6,541,022 for land acquisition and construction and $1,645,926 for services and evaluation.

With this funding, the project’s timeline includes the start of groundbreaking (April 2014), with construction to begin six to nine months after groundbreaking (September to December 2014). Residents will begin to move in within two to four weeks of construction completion.

In addition to beginning construction, current activities by the project partners include the following:

- Recruiting a project director to serve as overall director responsible for ongoing operations
- Finalizing a behavioral health-services delivery plan with Metrocare Services (with additional services support potentially available through Value Options and Dallas County through the 1115 Medicaid Transformation Waiver program)
- Finalizing resident services to be provided by City Square
- Finalizing the evaluation plan with principal investigators through UT Southwestern Medical Center
- Finalizing resident selection criteria to match the mission of serving those most in need of permanent supportive housing, and identifying potential residents so that all 50 units are filled as soon as construction is completed
- Obtaining an agreement from Parkland Hospital and other area hospitals to provide physical health services for identified residents
- Revising the overall project agreement to reflect changes in roles and responsibilities as the project has matured.

**City of Dallas (Dallas Police Department).** The $15 million grant to the Dallas Police Department (DPD) in 2005 is the largest single grant commitment made to date by the Caruth Foundation. It was also the largest grant on record at the time through a public foundation to a police department anywhere in the country. Although an initial $5 million of the grant was used to purchase much-needed police equipment, hardware and upgrades, the remaining $10 million funded the Caruth Police Institute (CPI), which is designed to prepare leaders in DPD to become better-educated, better-trained officers in order to effectively protect and serve the citizens of Dallas. With key collaboration from the University of North Texas at Dallas and the University of Texas at Dallas, CPI now provides high-quality leadership training for all levels of the DPD.

The Caruth Foundation’s grant to DPD served as a catalyst for generating needed additional philanthropic support to dramatically strengthen DPD’s ability to reduce crime and increase public safety in the City of Dallas. Since 2008 Dallas has experienced consistent decreases in the number of crimes reported to DPD, from approximately 68 crimes per thousand residents in 2008 to approximately 50 crimes per thousand residents in 2012. Although numerous factors have certainly contributed to this decline, the Caruth Foundation’s investment in crime-reduction technologies for DPD, as well as the investment in leadership development through the CPI, played an important role in improving DPD’s abilities to think and act strategically and proactively in order to make the most effective use of available resources.
In 2012, RAND Corporation evaluated the Caruth Foundation’s grant to DPD, including an evaluation of CPI in its first years of operation through 2012, CPI’s approach to staff development, the institute’s success in assisting DPD in solving complex problems, and CPI’s plans for long-term sustainability. RAND found that the grant “helped the department implement major changes in its approach to policing.” The evaluation reported positive findings that supported officer safety, enhanced internal-affairs investigations, and increased field efficiency and officer effectiveness. With respect to the impact of CPI on leadership training and research, RAND found that CPI has been an important vehicle for enhancing the leadership skills of mid- and high-level DPD officers and creating a more professional police force. However, with respect to the research and problem-solving capacity of CPI, questions remain about whether it will achieve the potential envisioned (see “Case Study: Improving Leadership in the Dallas Police Department (DPD)”).

Mass Care Task Force. In 2005, Dallas’s four major nonprofit disaster response agencies for humanitarian relief—The American Red Cross (Dallas-Fort Worth Chapter), The Salvation Army (DFW Metroplex Command), North Texas Food Bank, and The Volunteer Center of North Texas—were called into action to serve thousands of people flooding into Dallas following Hurricane Katrina. Although each agency quickly mobilized resources to serve those displaced by Katrina, all actors quickly realized that Dallas needed a comprehensive disaster-response plan to coordinate efforts in the future and provide more-effective and more-efficient responses to meet the immediate basic needs of disaster victims.

In 2008, the Caruth Foundation approved a lead project grant of up to $5,000,000 over four years (and as a 1:1 challenge to other potential investors for a $26.6 million project budget) to develop and implement a Mass Care Response and Disaster Relief Plan for North Texas. The funds supported improved public safety and disaster preparedness, provided supplies and services to people impacted by a disaster, developed an efficient and effective emergency and disaster plan, improved communications between agencies, and provided a more disaster-ready collaborative mass care response capability—shelters, emergency services, food and supplies, and volunteers—to serve up to 37,500 victims across a five-county area of North Texas during a disaster affecting up to 250,000 people.

To date the Mass Care Task Force has spent $7.6 million of its original budget, including $3.6 million in Caruth funds. Expenditures include direct costs related to developing a comprehensive response plan, equipment needs, and project management. Over the life of the grant, the task force developed a series of metrics to determine Dallas’ level to preparedness to effectively respond to disasters. The composite measure of preparedness includes weighted measures related to leadership and management, sheltering, feeding, communications, and volunteers. At present, the task force has achieved an overall self-assessed preparedness rating of 57 percent. The term of the five-year challenge grant has recently expired, and the four project partners are preparing a summative grant report.

Beyond its impact at home, Dallas’s Mass Care Task Force has had a broader impact. According to national disaster relief and response experts, this task force is the first of its kind. The disaster planning and preparation work being done by the task force is now being shared with other cities in Texas and can become a model for other major cities across the country.
Texas Health Presbyterian Foundation. According to Department of Justice statistics, one quarter of all women will be sexually assaulted in their lifetimes, but fewer than 18 percent of these cases will be reported to law enforcement. But if there is a Sexual Assault Nurse Examiner (SANE) program in place and a SANE-certified nurse collects evidence, the successful prosecution of rape cases increases by 95 percent. In 2008 Dallas was the largest city in the U.S. not utilizing Sexual Assault Nurse Examiners. The Texas Health Presbyterian Foundation and the Dallas Area Rape Crisis Center requested that the Caruth Foundation consider a grant of $2,000,000 to support the first Dallas County SANE program and to present a blueprint for the development of comprehensive SANE programs.

This grant was designated to support development of the first comprehensive sexual assault victims’ services program in Dallas County. Recipients of grant funds include the Texas Health Presbyterian Foundation (THP) and, through subgrants, the Dallas Area Rape Crisis Center (DARCC) and Texas Health Presbyterian Hospital Dallas (THPHD). The core of this program is the creation of a dedicated SANE program and the support of the SANE facilities’ buildout in the THPHD emergency room. The program will render comprehensive medical and support services to victims of sexual assault; it will demonstrably improve current sexual assault statistics in Dallas, making Dallas a safer and better place to live; it will provide comprehensive SANE-certified treatment for sexual assault victims in a larger number of cases, including court-admissible evidence collection; and it will strive to become a national leader in providing sexual-assault services. THPHD is currently the sole Dallas County location for SANE training and certification. In January 2014, following successful implementation and operation of the THPHD SANE program, Methodist Dallas Medical Center announced the opening of a SANE program to serve the southern sector of Dallas County. Methodist’s nurses trained and completed clinical exams with Texas Health SANEs. Additionally, there has recently been a discussion of future plans for the development of additional SANE programs to provide comprehensive sexual-assault services across North Texas.

The completed renovation of the existing square footage in the THPHD emergency-room area includes patient rooms, suite areas for a patient and family waiting/holding room, a social-service and law-enforcement interview room, training/viewing areas, a private bathroom with shower, a general waiting room, an evidence closet with secure locks, a SANE training/on-call room, and secure entrances. The space for this program is available for victims of both sexes and limited to use for SANE purposes.

Thanks to this grant, DARCC now provides the first 24-hour rape-crisis hotline in Dallas County, free unlimited counseling for sexual-assault victims and their loved ones, hospital and courtroom advocacy, and community outreach sexual-assault prevention, awareness programs, and education.

Since launching the program, THPHD has received an incredible amount of positive press on the value of the SANE program and the hospital’s specially designed SANE suites. This increased public awareness has provided the opportunity for THPHD and DARCC to work with other local hospitals, including Methodist Health System, to expand the SANE program across North Texas.
It has also had concrete impact. SANE nurses at THPHD were credited in July 2012 and April 2013 with helping DPD identify and apprehend two perpetrators connected to multiple rapes in the Dallas area. In July 2012, THPHD nurses contacted DPD after noticing similarities in the evidence collected from two rape victims at the hospital. DPD was able to quickly analyze the evidence, leading to the identification and apprehension of the suspect.

In April 2013, DPD asked THPHD to conduct SANE examinations of three sexual-assault victims during the investigation of a series of rapes in the Lake Highlands area of Dallas. Forensic evidence collected by SANE nurses helped produce a DNA profile of the unknown suspect, confirming that the same offender had committed all three offenses. When the suspect was arrested, DNA evidence collected during the victims’ forensic exams confirmed that the correct person had been apprehended.

Also, Texas Health Presbyterian Foundation agreed to serve in the future as an operations resource for DARCC to assist in its growth as a 501(c)(3) organization. It intends to help DARCC strengthen volunteer support, develop fundraising programs, and assist where possible with leadership, board development, and management.

**Education**

**Southern Methodist University (SMU) Child Advocacy Legal Clinic and Institute of Children's Rights.** The W.W. Caruth, Jr. Child Advocacy Legal Clinic was created in 2001, funded by a grant of $1,200,000 from the Caruth Foundation. From 2001 to 2009, the clinic successfully represented the best interests of abused and neglected children in the courtroom and beyond. Prior to the clinic’s creation, Dallas was the largest city in the United States without a child-advocacy clinic at a law school.

In 2010 the Caruth Foundation made an additional grant of up to $2,500,000 to SMU’s Dedman School of Law to support the operations of the W.W. Caruth, Jr. Child Advocacy Legal Clinic and to establish the W.W. Caruth, Jr. Institute for Children’s Rights. The objective of the grant is to educate law students on abused and neglected children and then to directly provide best-in-class legal support for such children. When abused or neglected children are removed from their families and are living under the authority of Child Protective Services, they face a daunting prospect fraught with uncertainty and are in dire need of advocacy.

The primary goal of the Caruth Clinic is to concentrate on the current practical and legal needs of abused and neglected children by providing children who have been removed from their homes by Child Protective Services with student attorneys who represent them in court as their guardians and attorneys ad litem. A goal of the Caruth Institute is to focus more on long-term academic issues of child welfare law and to provide leadership to community organizations and professionals in the fields of child welfare, protection and law. Through their efforts, SMU and the Dedman School of Law strive to advance the frontiers of child advocacy and child welfare law in the Dallas area, the State of Texas, and the United States in order to address the fundamental overarching challenges of child abuse and neglect.

In 2013, SMU reported that the W.W. Caruth, Jr. Child Advocacy Program had made strides in the care and representation of children in the court system since its inception. The Caruth Clinic has developed an interdisciplinary practice model and trained law students in the use of this model through supervised clinical experience. The Caruth Clinic has trained more than 150 students and represented nearly 175 abused and neglected children in Dallas County. Alumni of the Caruth Clinic remain involved in its mission and continue to serve as guardians and attorneys ad litem for children and inspire other attorneys to volunteer their time in the service of maltreated children.
Changes in the leadership of the Dedman School of Law and the directorship of the Caruth Clinic and Institute have impacted current clinic and institute programs. The Caruth Clinic is reviewing the concept of a Pro Se Kinship outreach program. The goal is to secure safe, stable, permanent placements for children who are already in the physical custody of a relative but remain in the legal custody of a parent. As part of the program, law students who participate would teach these relatives how to represent themselves in court in order to gain legal custody and to assist them in the process. SMU has informed the Caruth Foundation that it will propose additional goals for the Caruth Clinic program once the new clinic director has had an opportunity to explore and develop possible replacement goals.

Commit2Dallas (COMMIT!). Dallas County has more than 800,000 students. When these students graduate from public high schools, what happens to them? At the moment, only 13 percent of them graduate from high school ready to succeed in postsecondary education. This percentage drops to 4 percent for African-American and Hispanic students, who together represent more than 80 percent of the region’s first-graders.

This grant supports the work of COMMIT! to transform the way the Dallas community thinks about and approaches education. COMMIT! focuses on a data-driven “whole pipeline” approach that looks at education, cradle to career, in pursuit of its goal to become a critical driver in substantially improving the eventual levels of post-secondary readiness and completion by Dallas County students. COMMIT!’s collective impact strategy is based on successfully establishing the following: (1) a common agenda for all stakeholders, (2) shared measurement systems, (3) backbone support from an impartial entity, (4) mutually reinforcing activities across the COMMIT! Partnership, and (5) continuous communication with all stakeholders about progress and remaining challenges.

To measure COMMIT!’s impact, 11 community Cradle to Career Academic Indicators (“Key Performance Indicators”) are measured:

- Kindergarten Readiness
- Third-grade Commended Reading
- Fourth-grade Commended Math
- Eighth-grade Commended Math
- Eighth-grade Commended Science
- Percent with College-Ready Pre SAT/ACT Scores
- Number and Percent of Eleventh- or Twelfth-Graders with College-Ready SAT/ACT Scores
- High School Graduation Rate
- Post-secondary Enrollment
- First-Year Post-secondary Retention Rate
- Post-secondary Graduation Within 150 Percent of Expected Timing

COMMIT! believes that substantial progress can be made in reaching these outcome metrics by the end of 2018 while also driving greater awareness and engagement from across the community, state, and nation to understand the educational challenges, importance, and opportunities for the Dallas community.

Ultimately, COMMIT! will work to elevate and help spread effective practices that will close the educational achievement gap; increase collaboration, investment, and innovation through greater data transparency; and
contribute to the community’s visibility as a reform-focused region, thus attracting top teaching and leadership talent from across the state and country.

In 2013, COMMIT! activities included the following:

- **Bringing together** a partnership of more than 110 organizations from multiple sectors—early-childhood providers, K-12 public districts and private schools, higher-education institutions, parent and teacher groups, nonprofit and faith-based organizations, foundations, and businesses—that collectively represents 12 school districts serving about 337,000 students and eight higher-education institutions serving about 124,000 students.

- **Publishing** Dallas County’s first Achievement Scorecard, documenting aggregate student achievement against community indicators and disaggregating achievement by socioeconomic status.

- **Forming** a Data Support Council to bring together evaluation and accountability leaders from across the Commit! Partnership, including school districts and higher-education institutions, to both guide the annual scorecard in the future and advise on matters related to data across the partnership’s full scope of work.

- **Growing** into a team consisting of 15 full-time equivalents, adding leadership and data capacity.

- **Establishing and activating** an infrastructure—or “accountability structure”—organized around having an impact on the 11 community indicators through mutually reinforcing action.

- **Launching** four action networks—groups of cross-sector organizations and practitioners working collaboratively to execute plans impacting kindergarten readiness, third-grade reading, and postsecondary enrollment in 2013.

- **Developing** a brand vision and mission statement that have been reinforced through more than 100,000 unique visits to its revitalized website, 3,200 members in its contact base, 2,100 Twitter followers, and 600 Facebook fans.

- **Publishing** (along with its first Achievement Scorecard) three stories of impact highlighting effective practices in pre-K enrollment, single-gender middle schools, and college access.

- **Convening** more than 600 community members through open gatherings, providing updates and on-ramps for participation.

COMMIT! has nearly completed compiling all available education data in a comprehensive database that will serve as the foundation for the partnership’s community scorecard, data analysis across the infrastructure, and target data assistance for its partners. In partnership with Educate Texas and Grand Prairie Independent School District, it hosted a symposium of 400 superintendents, school board members, and public officials from across Texas to promote the “schools of choice” model. Working with 33 area foundations, COMMIT! published Dallas County’s first Giving Profile, which provides a more complete picture of how education philanthropy in the region adds up. COMMIT! reports that it has raised roughly $4.5 million to support the backbone organization through 2015 and is therefore pleased to announce that it has received more than $1 million in paid contributions or commitments since the effective date of the Caruth Foundation’s matching grant challenge and thus qualifies for a final $500,000 payment in year three (2015) of the grant.

**Dallas County Community College District (DCCCD) Foundation, Inc.** Science, Technology, Engineering, and Mathematics—commonly known as STEM—are important fields for a number of reasons. Education in STEM fields helps to build critical thinking skills, increase the science literacy of the population, and make it possible for the next generation of student to excel as innovators.
Funds from this grant support operations and programs of the DCCCD STEM Institute and the DCCCD STEM Faculty Fellows program and provide financial and mentorship support for 100 competitively selected DCCCD students, known as DCCCD STEM scholars, who are committed to pursuing a degree in an eligible DCCCD STEM program. The primary goals of the DCCCD STEM Institute and the DCCCD STEM Faculty Fellows program are to:

- **Reduce** the shortage of workers entering STEM career fields and STEM-related teaching programs in Texas
- **Provide** STEM scholars with targeted paths to degree completion and opportunities for direct transfer into STEM programs at four-year universities
- **Serve** as a replicable national model for comprehensive post-secondary STEM education programs
- **Build** stronger relationships between DCCCD and the private sector in order to promote degree completion

DCCCD’s STEM scholars receive full scholarships for tuition and books and receive one-on-one mentoring by select DCCCD math and science Faculty Fellows. The target scholars include high-achieving students currently pursuing degrees in a STEM-related field, with priority participation given to first-generation and historically underserved students (minority and female). Also, STEM faculty mentors (Fellows) will be engaged in a series of professional and academic activities designed to facilitate their own development as elite science and math faculty. Faculty Fellows will provide leadership to other DCCCD STEM faculty, ultimately promoting systematic change in classroom pedagogy, practice, and curriculum to better serve and educate STEM students.

At the end of each year, the DCCCD STEM Institute and DCCCD STEM Faculty Fellows program have the following goals:

1. Forty percent of DCCCD STEM Institute students will have transferred and enrolled in or be in the process of transferring to and enrolling in a four-year university (some students may graduate from DCCCD before transferring).
2. Thirty-five percent will have graduated from DCCCD with a STEM degree at DCCCD (some students may instead transfer to a four-year university).
3. Fifty percent will continue their studies at DCCCD.
4. Ninety percent of students enrolled in the DCCCD STEM Institute project will have maintained a 3.0 grade point average (GPA) or higher.

Educate Texas will provide recommendations to help the DCCCD develop a research and evaluation plan and a plan for financial sustainability within the DCCCD Foundation and DCCCD beyond the three years of the grant period, along with options for the potential scaling of this program based on successful results in other community colleges in Texas or nationally.

**Medical and Scientific Research**

**Children’s Medical Center Foundation.** This grant of up to $7,500,000 supports the Children’s Research Institute’s creation of an exceptional scientific environment dedicated to groundbreaking biomedical discoveries and new insights into the biological underpinnings of disease.

Children’s Medical Center has been making life better for children for 100 years. Children’s physicians care for almost 200,000 children each year, touching their lives approximately 600,000 times. Children’s is the only academic healthcare provider in North Texas dedicated exclusively to the comprehensive care of
children from birth to age 18 and is the primary pediatric teaching hospital for UT Southwestern Medical School. It is one of the leading academic medical centers in the country. Numbering more than 2,600, UT Southwestern faculty are responsible for groundbreaking medical advances and for the translation of science into new therapies.

Children’s Research Institute (CRI) was created to leverage the clinical and scientific strengths of Children’s Medical Center and UT Southwestern Medical Center in order to develop future therapies and treatments focused at the interface of stem cell biology, cancer, and metabolism, based on an interdisciplinary approach involving teams of physicians and scientists to integrate basic science with clinical relevance. Ultimately CRI will employ a team of 150 world-class physicians and scientists who will pursue discoveries related to the prevention, treatment, and cure of cancer, birth defects, and metabolic diseases.

CRI’s goals are as follows:
1. To support the mission of Children’s Medical Center to make life better for children by conducting research that will be instrumental in developing new therapies and greater understanding of pediatric disease
2. To pursue biomedical research designed to better understand the biological basis of disease
3. To discover new strategies for treating disease
4. To discover the therapies of tomorrow, not optimize the treatments of today
5. To pursue scientific breakthroughs that change the way we think about scientific problems and about the treatment of incurable diseases
6. To focus at the interface of stem cell biology, cancer, and metabolism as interdisciplinary approaches to these fields, which hold unusual potential for the treatment of disease
7. To work collaboratively at the interface of these fields and, by combining the efforts of physicians and scientists who have skill sets rarely integrated at other institutions, to take unique approaches in order to develop unprecedented insights

When discoveries are made at CRI that have the potential to improve the treatment of disease, the organization will pursue translational research to deliver the benefits of these discoveries to patients, with the ultimate goal of curing someone who would not otherwise be cured. It is CRI’s goal to leverage the clinical and scientific strengths of Children’s Medical Center and UT Southwestern to lead the way in a new era of scientific discovery. CRI will be guided by four basic principles: recruit the finest scientists, invest in potentially transformative research, take risks to solve problems that others consider too difficult, and work in an interdisciplinary way, integrating basic science with clinical relevance.

The Caruth Foundation’s grant funds are designated to support either the CRI endowment or CRI’s annual operations.

**American Heart Association, Inc. (SouthWest Affiliate)** Every day in Dallas County, approximately 30 people suffer heart attacks and depend on the seamless delivery of medical services to increase their chances of survival and a future high quality of life. Unfortunately, Dallas County has offered a fragmented, substandard emergency heart attack response system and has failed to consistently deliver optimal, seamless, and timely care to every person who falls victim to heart attack.

This grant was designated to provide two-year funding for the American Heart Association, Inc. (AHA) to create a Dallas County emergency response system...
for coordinated treatment of myocardial infarction. Funds were to be used to support program administration costs (personnel), hospital support, Emergency Medical Services (EMS) support, training and equipment, third-party data analysis and evaluation, office services, stakeholder programs, community and public relations, and contingencies.

Specifically, the AHA SouthWest Affiliate, in collaboration with Dallas County’s strategic partners, sought to create a model program that targeted heart attack patients who experience an ST-Elevation Myocardial Infarction (STEMI) heart attack. It addressed patients’ needs by concentrating on the links in the chain of survival—patients, EMS, emergency physicians and nurses, cardiologists, lab staff, and all area hospitals—a seamless operating STEMI system ensuring that every Dallas County EMS provider and hospital has the technology and training needed to create defined protocols within the system so that each patient receives optimal treatment without delay, regardless of how each enters the emergency system.

The program’s goal was to revamp the Dallas County emergency response system for heart attack victims within two years such that minutes, perhaps hours, are removed from the timeline between the attack and treatment. Ultimately this means that more patients survive with less disability and that the often-shocking current variability between Dallas County heart attack patient outcomes is minimalized.

AHA SouthWest Affiliate and its strategic partners followed a detailed project timeline to deliver two primary outcomes:

1. Provide optimal care to each heart attack victim in Dallas County through a dynamic, seamless, thoroughly integrated emergency care system.

2. Collect new, complete and analyzable Dallas County public safety data, including the creation of a new Caruth Symptom Onset through Arterial Reperfusion (SOAR) metric to evaluate heart attack system-level performance.

The charts in Figure 2 show that by the end of the third quarter of 2012, the project was successful in reducing SOAR time and hospital time to treatment.

System deliverables included the following:

• Accountable and documented collaboration and data sharing among all key public safety stakeholders in Dallas County

• Proof of a seamless emergency care system delivering optimal care to heart attack victims

• An increased body of evidence-based scientific knowledge of emergency care and public safety systems

• A revolutionary science-based public awareness strategy, built on project findings, for implementation after project completion.
Figure 2. Reducing SOAR Time and Hospital Time to Treatment (3rd Quarter 2012)
Case Study: Creating a Model STEMI Program

The Need to Get Beyond the Luck of the Draw. If an individual had had a heart attack in Dallas County three years ago, the care was not very good, according to the American Heart Association (AHA). At the time, the Dallas County system was failing to consistently deliver optimal, seamless, and timely care to every person who falls victim to heart attack—it was the luck of the draw as to what outcome each patient would experience. Through its grant, the Caruth Foundation became—to use AHA’s analogy—the “first responder” to a call for help with an investment of $3.5 million to help change that reality. The task was challenging: diagnose, measure, and potentially overhaul every aspect of the response-and-treatment chain that is activated upon patients’ recognition of heart attack symptoms and the activation of the system. In partnership with the medical community, the AHA would design a collaborative initiative to transform patient care for the benefit of future heart-attack victims in Dallas County and to position it as a national leader in heart-attack treatment and patient survival.

Focusing on the Links in the Chain of Survival. The AHA proposed creating a model program that would target heart attack patients who experience an ST-Elevation Myocardial Infarction (STEMI) heart attack—the most deadly type of heart attack. The program would address patients’ needs by concentrating on the links in the chain of survival of patients, Emergency Medical Services (EMS), emergency physicians and nurses, cardiologists, lab staff, and all area hospitals. It would establish a seamless operating STEMI system that would ensure that every Dallas County EMS provider and hospital would have the technology and training to create defined protocols within the system so that all patients received optimal treatment without delay, regardless of how they entered the emergency system.

Meeting Goals and Having an Impact. In January 2013, AHA reported that it had satisfied all the grant requirements, including meeting or exceeding all benchmarks and squarely delivering on both primary grant outcomes by establishing an innovative regional collaboration that focused on the entire spectrum of care—a collaboration including convening members of all 15 Dallas County hospitals (with five competing systems) and 24 Dallas County EMS agencies. In March 2013, AHA announced that the effort successfully accomplished the following:

- Established the first measure of the total heart attack time in Dallas County, including patient recognition of the warning signs, the time the patient started seeking emergency care, the EMS treatment time, and the hospital treatment time known as the Symptom Onset to Arterial Reperfusion (SOAR) metric. SOAR showed a 5 percent overall improvement, down 10 minutes—from 195 to 185 minutes—after the grant was implemented
- Significantly reduced the hospital emergency departments’ and cath labs’ treatment times (door-to-balloon-times) when EMS called ahead and sent patient data to the receiving hospital, saving 21 precious minutes of total treatment time—a 320 percent overall improvement
Case Study: Creating a Model STEMI Program, continued

- Drastically reduced the first medical contact to balloon time—from the time that the EMS began eye-to-eye contact with the heart attack patient to the time the blockage was removed in the cath lab—by 31 percent, from 133 minutes to 91 minutes

Beyond achieving the primary grant outcomes and related grant deliverables, AHA reported significant achievements in training, equipment, culture, data, and metrics, as shown in the table.

**Significant Grant Achievements**

**What Was Learned** The AHA team reported that it learned the following during grant implementation:

- AHA confirmed that active EMS engagement in STEMI treatment was essential in reducing door-to-balloon times and total reperfusion times
- Based on a survey of all 39 participating organizations, AHA learned that knowledge gaps were process-related rather than skills-related, thus enabling AHA to create a tailored education program that focused on the process and protocols that should occur with every STEMI patient
- AHA found that gathering and analyzing EMS data firsthand was extremely costly, difficult to sustain, and hard to replicate. Project team stakeholders and staff recommended that the data fields used by the project be permanently adopted by a national data registry called ACTION Registry®—Get With the Guidelines™. This third-party common data collection tool and analysis is a joint American College of Cardiology and AHA registry and the only current national acute heart attack data registry. It is currently the primary database used by all hospital participants in the Caruth initiative.

<table>
<thead>
<tr>
<th>Training</th>
<th>Created and developed 4,273 hospital or EMS training workbooks for individual health care professionals, five separate 12-lead EKG training seminars attended by 460 professionals, and two professional conferences attended by 280 providers in 2011 and 340 providers in 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>Provided all EMS agencies with desperately needed equipment and telecommunications upgrades to ensure the seamless transmission of EKGs to receiving stations in all hospitals</td>
</tr>
<tr>
<td>Culture</td>
<td>Brought together cardiologists, emergency physicians, EMS personnel, nurses, cath lab staff, and hospital administrators to reach a common goal by equally and fairly engaging EMS personnel, hospital staff, and physicians to improve cardiac care</td>
</tr>
<tr>
<td>Data</td>
<td>Collected and paired previously isolated patient EMS and hospital data to identify system-level measurements and patient care improvement opportunities that enabled participants, for the first time, to measure the total time that a patient was treated after his or her call to 911</td>
</tr>
<tr>
<td>Metrics</td>
<td>Created a new scientific metric for heart attack response: SOAR (Symptom Onset through Arterial Reperfusion)</td>
</tr>
</tbody>
</table>
Case Study: Creating a Model STEMI Program, continued

- When AHA conducted primary research for its community awareness strategy, it encountered some unanticipated patient perceptions involving mistrust and misconceptions in the personnel and process involved when 911 is called in a heart attack emergency. Specifically, it found that the ambulance is not considered a point of care but is viewed generally as transportation, that 911 responders are not regarded as medical professionals with the skills to deliver heart attack treatment to save lives, and that there is little awareness that the ambulance and hospital need to communicate and transmit patient information that expedites treatment upon patient arrival. The conclusion was that much of the Dallas County community that needs the system most does not know that it can trust the system to perform. A Dallas County-centric campaign is required to leverage the work that has been completed in rebuilding the heart attack response system.

What Was Accomplished. AHA has gone a long way toward fulfilling its commitment to develop and implement a coordinated STEMI program that would transform heart attack patient care in Dallas County and serve as a model for the rest of the state and the country. **At the individual level**, the program boldly aspired to change the course of life for every future heart attack victim. In many cases, the implementation of the program was able to shift patients from imminent death to sustained life, and return loved ones to their families. **At the system level**, this model program transformed the complex network of local emergency public safety servants and receiving hospitals from a loosely connected web to a true working system. It achieved this result by providing critical resources, sharing data, and providing the collaboration needed to reach the program’s full impact potential. **At the global level**, the STEMI program implemented through this grant has generated new scientific knowledge to provide health care systems and other grantmakers with a model partnership to emulate in order to transform their own communities in turn.
Case Study: Improving Leadership in the Dallas Police Department (DPD)

When the Caruth Foundation made a $15 million grant to the Dallas Police Department, $5 million was used to purchase technology and equipment to help improve policing in Dallas. But what made the most sense for the remaining $10 million? Conversations led to two recommended options for the remaining grant dollars, both of which were focused on increasing DPD force effectiveness: (1) integrate multiple distinct databases across the department or (2) invest in leadership training for officers being promoted. Both the chief of police and the city manager agreed with the importance of these two documented needs. But the city manager indicated that it was consistently easier to find grants to support technology-related projects than to find funds for leadership training and development. Also, the chief of police felt that there was greater urgency to restore leadership training to officers that had been cut through the years during times of mandatory reduction to DPD’s overall budget.

In 2008, The Caruth Police Institute at Dallas (CPI) established a partnership between the Dallas Police Department (DPD), the University of North Texas at Dallas, and the University of Texas at Dallas. The partnership had specific goals: provide the DPD with high-quality staff development courses and use resources from university and the local business community to help solve complex policing problems.

Understanding How Well CPI Has Done. To find out what CPI’s impact has been over its three-year history, the Caruth Foundation engaged the RAND Corporation—a nonprofit institution that helps improve policy and decision making through research and analysis—to conduct a formal review of CPI performance. RAND assessed how much progress CPI has made and evaluated the Institute’s plans for long-term sustainability.

All the quotes below shown in italics are drawn from the RAND final report: Davis, Robert C. and Radha Iyengar, Evaluation of the Caruth Police Institute at Dallas, RAND Corporation, Santa Monica, CA, 2013. © 2013 RAND Corporation “Reprinted with permission.” The full report may be viewed at http://www.rand.org/pubs/research_reports/RR312.html.

RAND assessed how much progress CPI has made and evaluated the Institute’s plans for long-term sustainability.
Case Study: Improving Leadership in the Dallas Police Department (DPD), continued

What Did the Evaluation Find? The RAND evaluation’s bottom line is that “CPI has been an important vehicle for enhancing leadership skills of mid- and high-level DPD officers and creating a more professional police force.” However, “Questions remain about whether CPI will achieve the potential envisioned by its planners.” Beyond the overarching conclusion, the RAND study also offered more detailed conclusions.

“CPI has been a significant addition to the DPD. It is providing high-quality management and leadership training for mid- and high-level officers. Its courses draw from popular texts on leadership and critical thinking within both the policing and business realms and use teaching methods recognized to be best practices.” Features of the CPI courses cited by RAND are: the opportunity to interact with instructors who are national leaders in law enforcement; exposure to courses that “not only teach leadership and critical thinking skills” but also “forge bonds between course participants that participants draw on when they go back to their regular duties.” CPI courses have “prepared Dallas managers for continuing to move the department forward and to be better equipped to take advantage of the technological and strategic innovations that the department is implementing.”

“The vision for CPI has changed as the DPD has undergone a change in leadership.” RAND cites a leadership vision characterized by a change from identifying the best and brightest officers early in their careers and allowing them to volunteer for courses (former chief) to a more limited range of courses (one course for each rank), where all officers are mandated to participate in the course for their rank as they move up (current chief). An additional factor of note is the elimination of the city’s tuition reimbursement policy that caused relatively few officers to use CPI courses. Still, RAND concludes that “the current use that is made of the Institute provides significant benefit to the DPD.”

“Through its guidance of the DPD strategic planning process, CPI is also contributing directly to the safety of Dallas citizens.” RAND notes that the department’s strategic planning process includes “goals that could have substantial payoffs for public safety, including continued enhancements in technology, improvements in the investigative process, and engagement of the community through its innovative community-policing program and expanded use of social media.”

Importantly, RAND observes that there are challenges that face the CPI: “Still, major questions remain about whether CPI will achieve the potential envisioned by its planners.” RAND notes that “The concept of CPI as a regional training center and as a vehicle for promoting the national reputation of the DPD remains largely unrealized.” RAND suggests that CPI could “take steps to enhance its regional status and develop a national reputation.” They include following the Johns Hopkins Public Safety Leadership program example. Other ways of enhancing CPI’s regional reputation might be: 1) developing a partnership with the Institute of Law Enforcement Administration (ILEA) to sponsor events; 2) providing a leadership training program to create a regional preceence and reputation for CPI as well as to generate needed revenue; and 3) opening CPI’s Chiefs’ Forums to executive staff of regional law enforcement agencies.

On the national front, RAND concluded that “It is probably fair to say that CPI has not made a mark on the national policing scene inspite of the fact that Dallas is unique in offering high-quality
Case Study: Improving Leadership in the Dallas Police Department (DPD), continued

staff development courses to large numbers of officers.” Options for addressing this lack of national impact include: developing a national best practices library, newsletter, publishing articles, and developing a website an social media presence for CPI.

RAND also notes that CPI has not achieved its full potential when it comes to research and problem-solving. RAND attributes this in part to the “shift in the new DPD administration to train all new supervisory and mid-level personnel...” This shift has “placed a substantial burden on the staff of CPI, diminishing the time available to focus on grants, consulting and conference planning.” The impact of this shift has been that “CPI became wholly focused on internal training needs, with little time for exploring the types of activities that would build national awareness and self-sustainability.”

Having a key research vacancy has also hurt: “The failure to fill the position of CPI research director has meant that the research component of the Institute has been adrift.” RAND notes that plans to develop a CPI research agenda “have never materialized because CPI lacks the capability to carry out a comprehensive research program.” There has been “no high-quality sophisticated research, no effort to publicize research products, and no effort to compete for research grants.”

Where Does CPI Go from Here?

In terms of moving forward, the RAND report points out that “To increase its potential contribution as a regional and national resource would take money, and revenue has been a major issue for the Institute.” RAND notes that attracting external officers to its courses is CPI’s only significant source of revenue; however, this would require significant new investments to enhance the Institute’s reputation, to develop a broader range of courses and the means to deliver these courses. RAND suggests that potential solutions to ongoing financial issues are: using the balance of the original Caruth Foundation’s gift to fund CPI operations; dealing with constraints on charging DPD officers for taking courses; sharing tuition revenue with CPI’s university partners; cost sharing to cover CPI instruction expenses; and additional CFT support to assist with tuition reimbursement CPI officers taking courses for credit.

In summary, RAND concludes that “CPI is at a choice point: It can continue to keep costs very low and, using endowment earnings, sustain its current efforts to train DPD officers exclusively and conduct small research projects at the chief’s request. Or it can make an investment in personnel in an effort to broaden its reputation and reach beyond DPD and enhance its revenue base.”
Communications

Context

Over the past few years, the efforts of CFT Communications have grown from executing a fairly basic communications plan to creating a full-bodied marketing strategy—one that is better aimed at the foundation’s key audiences and more inclusive of foundation goals. CFT surveyed all of its donors in 2011 to gain a sense of where CFT was meeting expectations and where it could improve. Following this, the foundation added additional one-on-one interviews with all key stakeholder audiences, including new and established fund holders, professional advisors, board members, staff, and nonprofits—to even better understand how CFT is perceived by the many different groups of people that partner with us. That effort culminated in a session with CFT leadership that redefined CFT’s vision, positioning, and brand personality, thus forming the basis for a new brand identity system that was approved by the CFT board. For the first time, the new visual system brought together the Caruth Foundation, Educate Texas, and Entrepreneurs for North Texas (EFNT) under a CFT master brand, building more awareness for the foundation and its related initiatives and giving greater vigor and cohesiveness to foundation-wide efforts to make tomorrow better.

CFT now has a master marketing strategy and corresponding communications plan that is segmented by target audience and that leverages more mediums than ever. CFT’s own communications channels have expanded to new media—a website and social media channels—and its longstanding vehicles such as the annual report and newsletters have been sharpened to further illuminate CFT’s role as a trusted partner in community knowledge and collaboration.

The new brand vision was launched in the foundation’s FY 2011 annual report, which won a Silver Addy from the Dallas Press Club. That report, as well as the subsequent FY 2012 and FY 2013 annual reports, have been praised industry-wide for their storytelling effectiveness. The newly designed newsletters follow an improved editorial plan that dedicates space to reporting on key initiatives such as donor matchmaking, community impact grantmaking progress, EFNT results, and Educate Texas advances—making it possible to strategically highlight more grantees and donors to further build relationships with each. The launch event for donors brought to life the new brand and vision through video, mayoral endorsement, and grantee vignettes and set the stage for a bold new phase of our work.

Since 2011, external PR media outreach has been significantly increased as well. It is rare to go a month without seeing CFT receive an earned media mention. President and CEO Brent Christopher continues to build his reputation as a trusted advocate for the nonprofit sector in the region and a voice for philanthropists nationwide. His community speaking (as well as that of other staff) has increased, highlighting role of CFT in the community
for the past 60 years and increasing awareness for CFT programs such as D3, North Texas Giving Day, and more. Strategic grantmaking coverage has increased, and the first-ever press conference about a discretionary grant gained unprecedented awareness and buzz, building momentum for increased confidence in our vision.

Additionally, CFT re-launched an improved website in April 2013 that better speaks to each of its target audiences. Although it is primarily designed to attract new fund holders, it also now offers much more complete and transparent information to nonprofits and better explains our grantmaking processes in our main funding areas. In addition, CFTexas.org highlights CFT’s community knowledge in a much stronger way through the “Find Your Cause” and “Giving Guide” sections. The website has also furthered CFT’s community outreach program through its speakers’ bureau page.

Activities

As they relate to grantmaking, CFT’s communication goals include furthering awareness for (1) CFT’s strategic grantmaking, especially the newly defined community impact areas and the Caruth Foundation, and (2) CFT as a trusted partner for community knowledge and collaboration—furthering philanthropy. To that end, the team has worked on a series of media outreach activities in these two areas, which are summarized below.

Strategic Grantmaking

CFT’s work in strategic grantmaking focuses on economic security for the working poor as well as education, health care, scientific research, and public safety. Summaries of communications efforts in these areas are discussed below, followed by a list of selected media coverage in the area.

Building the Economic Security of the Working Poor. CFT launched the newly directed community impact grantmaking focus areas with gusto. To prepare for launching the Asset Poverty Profile for Dallas, CFT leadership participated in editorial board meetings with The Dallas Morning News (DMN), D Magazine, and Dallas Weekly and coordinated advance stories with the DMN, Dallas Observer, and Dallas Business Journal. Also, the February press conference was attended and/or covered by all major TV outlets (WFAA, KXAS, KTVT, KDFW, Fox 4, NBC, CBS Univision, and Telemundo) and radio stations (WBAP, KERA). The press conference served as a major rallying point and gave us the forum for seeding issues with elected officials through a pre-session with important officials and provided a town-hall-type forum for interested citizens and nonprofits, with 300+ strong attending the announcement. We also held a follow-up work session for nonprofits and promoted the hashtag #Stability4Families throughout the event, which gave the effort an additional 12,247 impressions through Twitter. The profile launch was also covered in industry trades such as Nonprofit Quarterly, thus furthering our influence of nonprofits nationally.

CFT launched the Data Driven Decision-Making (D3) Institute in the summer after the CFED Assets & Opportunity Profile launch. In addition to issuing a press release to call for applications to the institute, we announced the selected participants through CFT newsletters and the annual report and targeted media outreach. D3 awareness-building included feature stories focusing on the 16 selected nonprofits in the inaugural year of CFT’s D3
Institute, which are designed to increase the effectiveness of nonprofits that are improving the financial stability of low-income working families. CFT’s newsletter and annual-report stories have highlighted specific grantees and their participation, including coach profiles. Moreover, Asset Poverty Profile metrics have appeared in several articles in mainstream media and nonprofit publications. Donor- and nonprofit-oriented documentary screening events highlighted CFT’s leadership role and furthered awareness with fund holders. In 2013, building on the momentum, CFT Communications supported the announcement of the second selected cohort for 2013-2014.

The greatest impact of the heightened civic interest in the working poor was KERA’s agreement to create a localized documentary on issues facing North Texans and the willing participation of other funders to support its creation. In addition to creating the documentary, One Crisis Away, KERA developed a full range of coverage, heightening awareness of the issues facing the working poor and giving another voice to the nonprofits that serve them. The national and state-level CFED Scorecard, updated annually, provides additional fodder for reporters to cover the issue every February. Finally, CFT partnered with KERA to host a public forum to discuss asset poverty on February 27, 2014. This forum was followed by an airing of the recorded town hall discussion on KERA and related stories on March 27, 2014.

Improving Education in North Texas and Beyond. Education is a top priority for CFT, which devotes more than one-third of its annual grants to improving education.

The foundation’s At-Risk Middle School Youth grant-making program is part of a community-impact fund launched in July 2012. Since then CFT has provided more than $3 million in grants to train teachers and staff and engage at-risk middle school students across North Texas. At-risk youth grant stories focused grants provided by CFT to improve middle school education for such students. The strategy included overall grant dollar announcements and the pitching of in-depth stories featuring grantees. CFT also included each grantee as a panelist and/or a member of the host committee for CFT’s new Cause-Minded Conversation series throughout 2013 to give grantees additional publicity. Some grantees, such as the Center for BrainHealth, also ran their own media campaigns, generating additional coverage for their programs. Selected coverage included feature stories with KERA Think 90.1 (1-6-14), DMN (9-13), DBJ 7-27-12, DMN (9-25-12), Texas Nonprofits (10-29-12), and the Plano Courier (10-12-12). Coverage in CFT’s social media, newsletters, and annual report also highlighted the strong programs funded for school leaders and teachers.

The Caruth Foundation’s $1.8 million grant to benefit the Dallas County Community College District (DCCCD)’s Science, Technology, Engineering and Math (STEM) Institute provided an opportunity to feature the Caruth Foundation, CFT, and Educate Texas and the important work the three continue to do in education, specifically the STEM fields. DCCCD’s STEM Institute helps high-achieving STEM students earn degrees and prepare for
careers in their fields. As mentioned previously, the Caruth Foundation’s grant will help reduce the shortage of workers and future teachers in STEM fields. Educate Texas will work closely with the DCCCD STEM Institute to aid in its long-term sustainability, program evaluation, and alignment with the statewide STEM effort. The DCCCD grant was highlighted through articles in DMN 5-3-13, White Rock Lake Weekly 5-6-13, the DCCCD Foundation website and emails, the CFT website and newsletter, and several nonprofit and education trades.

Another unique opportunity to highlight CFT’s education work comes through mentions in articles about individual scholarships granted by CFT. CFT’s scholarship fund stories have communicated CFT’s management of more than 50 scholarship funds (with assets exceeding $9 million), using the recipient of the James 1:5 Fund as an example (DMN 7-27-13). Stories also showed that CFT embraces the intent of donors who want to give back to the community, such as the local placement, first-person story with a scholarship recipient (Rockwall County Herald, 8-3-2012, and Rockwall Herald Banner 8-10-13). Several more scholarships awarded during the year brought awareness to CFT’s education focus, such as AP Arts, Miao, and more. In most cases, each story ended with a note of CFT’s education investments overall across grantmaking areas.

**Improving Heart-Attack Care in Dallas County: American Heart Association.** The $3.5 million grant initiative between the AHA and the Caruth Foundation made significant improvements to streamline protocols between participating hospitals and Emergency Medical Services (EMS) agencies in a collaborative effort to reduce response times and optimize heart attack patient care, as covered previously. Over the two-year grant initiative there were dramatic results, with feature stories in the Dallas Business Journal 7-13-12 and 4-29-13 describing the transformative results and profiling the heart attack patients who benefited from the AHA grant that greatly reduced heart attack response times. Additionally, the grant was featured in quarterly results announcements from AHA through events, print, and TV throughout 2011, 2012, and 2013.

**Preparing for Disaster: The Mass Care Taskforce.** In 2009, CFT announced that it had established a fund and committed $5 million as a challenge grant over four years to support development and implementation of a Mass Care Response and Disaster Relief Plan for North Texas. The funding from the Caruth Foundation supported a first-in-the-nation collaboration of the American Red Cross Dallas Area Chapter, the North Texas Food Bank, The Salvation Army (DFW Metroplex Area Command), and the Volunteer Center of North Texas. As the leading mass-care responders in the DFW Metroplex, the four agencies joined forces as a Mass Care Task Force, whose goal is to increase emergency preparedness from its current ability to shelter and feed 7,800 to the ability to accommodate 40,000 individuals.

The launch was announced in the wake of Hurricane Katrina and the North Texas region’s lack of preparedness for facing such a disaster. As a follow-up, with each year’s release of the Taskforce’s “Preparedness Scorecard,” CFT releases the scorecard data and provides the media with an update of the plans. In 2012 the Taskforce ran a live disaster drill that was covered in a DMN Metro section front page article.
Selected Media Coverage of CFT’s Strategic Grantmaking Initiatives

Economic Security of the Working Poor

• “New initiatives to better serve working poor,” The Dallas Morning News (8-27-13)
• “Boot Camp will teach 16 nonprofits how to use data,” The Dallas Morning News (8-27-13)
• “Grants aid students, families,” The Dallas Morning News (9-25-12)
• “Making the most of millions,” Advocate (8-26-12)
• “Dallas Study Finds More at Risk of Poverty Than Most Realize,” Nonprofit Quarterly (2-27-12)
• “Earlier this week I reflected on the recently released study...” Eric Johnson Facebook and Johnson for Texas Twitter (2-24-12)
• “Pain of Financial Insecurity,” The Dallas Morning News (2-24-12)
• “Editorial: Financial insecurity hurts Dallas,” The Dallas Morning News (2-23-12)
• “Data-Driven Decision Making: Transforming Data into Impact,” Philanthropy Journal (8-22-12)
• “Poverty is More Complex than Income,” Change the Wind Blog by Rev. Gerald Britt, Jr. (2-20-12)
• “New study reveals startling picture of Dallas,” North Texas e-News (2-18-12)
• “Study Offers Detailed Look at Dallas Poverty,” Dallas Business Journal (2-17-12 to 2-23-12)
• “Poverty Risk High in City, report says,” The Dallas Morning News (2-17-12)
• “4 in 10 residents unprepared for personal financial catastrophe, report says,” The Dallas Morning News (2-17-12)
• “Poverty in Dallas,” KRLD-AM (2-16-12)
• “BLOG: Opinion: The fragile line between financial security and poverty in Dallas,” The Dallas Morning News (2-16-12)
• “The fragile line between financial security and poverty in Dallas,” The Dallas Morning News (2-16-12)
• “Report cites lack of financial safety net,” The Dallas Morning News (2-16-12)
• “39 Percent of Dallas Residents at Risk of Slipping Into Poverty,” KXAS-TV NBC5 First at Four, NBC5 News at 6 pm, and KXAS-TV Online (2-16-12)
• “Rawlings: We Must ‘Take Notice’ of High Number of Dallasites So Close to Asset Poverty,” Dallas Observer (2-16-12)
• “40% of Families on the Financial Edge,” KERA 90.1 (2-16-12)
• “4 in 10 Dallas residents are unprepared for personal financial catastrophe, report says,” The Dallas Morning News (2-16-12)
• “Two-Fifths of Dallas Households Are Just a Crisis Away From Serious Financial Trouble.” Dallas Observer-Online. (2-16-12)
Selected Media Coverage of CFT’s Strategic Grantmaking Initiatives, continued

Education

• “Communities Foundation of Texas grants $136,490 in 2013 to Plano ISD Foundation,” Plano Star Courier (1-20-14)
• “Reporting From the Trenches of Middle School,” KERA 90.1 THINK (1-6-14)
• “The Foundation STEM Institute receives $1.8 million Caruth Grant,” Dallas County Community College District Foundation (11-7-13)
• “Dump memorization, embrace innovation, higher education leaders say,” Dallas Business Journal (10-3-13)
• “Hard Work, New Look for School, EFNT Freedom Day” The Dallas Morning News (9-12-13)
• “U.S. Education Secretary Arne Duncan praises El Paso students,” El Paso Times (9-11-13)
• “West Dallas Middle Schoolers Get Brain Training,” KERA (9-8-13)
• Center for BrainHealth Monthly Newsletter (9-1-13)
• “Canales: Rio Grande Valley has best superintendents, innovative ideas,” Rio Grande Guardian (8-22-13)
• “Brain Training to Transform and Improve Dallas Middle School,” Center for BrainHealth (8-26-13)
• “Caruth Foundation plans to donate $7.5 million for faculty recruiting,” The Dallas Morning News-Community (7-5-13)
• “Caruth Grant Aids Education,” The Dallas Morning News – Business (5-31-13)
• “Commit! Receives $1.5M Grant from Caruth Foundation,” Dallas Business Journal (5-31-13)
• “Caruth Foundation pledges up to $1.5M to improve Dallas County Education” The Dallas Morning News (5-31-13)
• “Six Receive 2013 Common Cents Scholarships” Dallas Independent School District (5-23-13)
• “Obama visit another boost for touted school,” Austin American-Statesman (5-7-13)
• “Foundation gives $1.8 million to STEM,” White Rock Lake Weekly (5-6-13)
• “STEM Institute gets aid,” The Dallas Morning News (5-3-13)
• “Grant to expand early college programs,” The Monitor (4-22-13)
• “STEM Institute Receives $1.8 million Caruth Grant” Dallas County Community College District Foundation (4-17-13)
• “5 Important Ideas for Transforming Public Education in Dallas,” Frontburner.dmagazine.com (4-11-13)
• “W.W. Caruth, Jr. Foundation at CFT awards $1.8 million grant to DCCCD Foundation,” Dallas Community College District (4-8-13)
• “Communities Foundation of Texas Panel Tackles Dallas’ Education Woes,” Frontburner.dmagazine.com (2-27-13)
• “Communities Foundation of Texas Turns 60,” The Dallas Morning News (2-15-13)
• “Early College format to be scaled up in Rio Grande Valley,” Rio Grande Guardian (2-23-13)
• “$5.6M to fund early college highs in Brownsville, PSJA,” Brownsville Herald (2-21-13)
• “Craighead Green: Establishing an Art Fund,” Art News DFW (1-28-13)
Selected Media Coverage of CFT’s Strategic Grantmaking Initiatives, continued

• “Group Launches Reform Effort Focused on Teacher Quality,” Texas Tribune (12-19-12)
• “Freedom Day Project targets Zumwalt Middle School for community service,” Dallas Independent School District (11-23-12)
• “CFT grants over $2 million to improve middle school education,” Texas Non-Profits (10-29-12)
• “Plano ISD Foundation receives $144k grant,” Plano Star Courier (10-14-12)
• “Grant Aids Students, Families,” The Dallas Morning News (9-25-12)
• “Foundation to grant $2M for ‘at-risk’ students,” Dallas Business Journal (7-27-12 to 8-3-12)
• “Donors, CFT help students,” The Dallas Morning News (7-27-12)
• “Rockwall Heath grad gets $40,000 scholarship,” Rockwall Herald Banner (8-3-12)
• “Seeds for STEM Success,” The Dallas Morning News (3-26-12)
• “Editorial: Lancaster ISD embraces STEM education,” The Dallas Morning News (3-25-12)
• “Tackling Texas Top Challenge,” The Dallas Morning News (3-6-12)
• “Leader in education honored,” The Dallas Morning News (2-29-12)
• “Students in Poor Counties Get Creative Opportunities,” New York Times (12-24-10)
• “Big gift to build Big Thought,” The Dallas Morning News (12-17-10)

Medical & Scientific Research

• “$7.5 million dollar Caruth grant awarded to Children’s Medical Research Institute at UT Southwestern,” photo, Dallas Business Journal (9-9-13)
• “Caruth Foundation grants Children Medical Research Center $7.5 million dollars,” Philanthropy Journal (7-27-13)
• “Children’s gets $7.5M pledge,” The Dallas Morning News (6-20-13)
• “Caruth Foundation grant cuts heart attack response times,” Dallas Business Journal (3-29-13)
• “Heart Association initiative shows results,” Dallas Business Journal (6-13-12)
• “Hospital Improving Heart Attack Patient Response Time” CBS DFW (4-4-12)
• “W.W. Caruth, Jr. Foundation of Communities Foundation of Texas announced $2 million grant to Texas Health Presbyterian Hospital Dallas,” Park Cities People (2-4-11)
• “American Heart Association Grant,” Park Cities People (11-19-10)
• “W.W. Caruth, Jr. Foundation of Communities Foundation of Texas announced $3.5 million sent to South Central affiliate of American Heart Association,” Dallas Business Journal (10-21-10)
• “Gift aims to aid heart attack care,” The Dallas Morning News (10-14-10)
• “Heart Association receives $3.5 million grant,” Dallas Business Journal (10-13-10)

Public Safety

• “Sexual Assault Nurse Examination Program,” Texas Health Resources (11-11-13)
• “Commissioners to kick in $1M for homeless,” The Dallas Morning News (5-22-13)
• “A strong voice for rape victims,” The Dallas Morning News (5-20-13)
Selected Media Coverage of CFT’s Strategic Grantmaking Initiatives, continued

- “Texans Health Dallas SANE Nurses Assist with Suspect Identification,” The Dallas Morning News Neighbors Go Richardson/Lake Highlands (4-26-13)
- “GrowSouth Initiative receives second major donation,” The Dallas Weekly (8-26-12)
- “Nurses lead police to suspect in rapes,” The Dallas Morning News (7-30-12)
- “The Dallas Rape Crisis Center celebrated the opening of its Dallas headquarters,” Dallas Business Journal (5-11-12 to 5-17-12)
- “Hospital builds a better haven,” The Dallas Morning News (5-3-12)
- “Local Area Rape Crisis Center Opens,” Turtle Creek News (4-20-12)
- “Dallas Area Rape Crisis Center Provides Comfort in Turbulent Times,” WFAA (4-12-12)
- “New headquarters for rape crisis center,” The Dallas Morning News (4-11-12)
- “Ready for the worst case,” The Dallas Morning News (10-19-11)
- “Sex assault treatment unit opens,” The Dallas Morning News (9-20-11)
- “Homeless no more,” The Dallas Morning News (9-14-11)
- “Money sought for housing program,” The Dallas Morning News (9-7-11)
- “$2 million grant to fund services for rape victims,” The Dallas Morning News (11-18-10)
- “Communities Foundation of Texas and Big Brothers Big Sisters announce major grant,” Dallas Business Journal (6-18-10)
- “Big Brothers Big Sisters wins $3M grant,” The Dallas Morning News (6-8-10)
- “Project aims to break cycle of homeless ‘frequent fliers,’” The Dallas Morning News (4-10-10)

Charitable Tax Reform

- “Local Economy Snapshot: Charitable Giving,” The Dallas Morning News (6-27-13)
- “Charities defend tax break for giving,” The Dallas Morning News (2-15-13)
- “Charities: Cutting Deductions Only Hurts the Poor,” The Christian Broadcasting Network (CBN) (2-15-13)
- “Dallas charity leader joins chorus urging Congress to keep tax break for giving,” The Dallas Morning News (2-15-13)
- “Philanthropy on the rebound,” The Dallas Morning News (1-9-12)
- “Don’t mess with charity tax breaks,” The Dallas Morning News (11-14-11)
- “Year-end giving during uncertain times,” Council on Foundations (11-9-11)

Grantmaking Overviews/Philanthropy

- “Communities Foundation of Texas doles out $76 million in grants,” CultureMap Dallas (12-23-13)
- “Communities Foundation turns 60,” Dallas Business Journal (12-6-13)
- “Year End Charity Grants,” The Dallas Morning News (12-12-13)
- “Philanthropy drives Dallas,” The Dallas Morning News (10-3-13)
- “With each gift, there are stories,” The Dallas Morning News (7-15-13)
Selected Media Coverage of CFT’s Strategic Grantmaking Initiatives, continued

- “Communities Foundation of Texas Celebrates Its 60th Anniversary by Bringing the Dallas Mayors Together to Chat on Generosity,” MySweetCharity (7-2-13)
- “Mayors emphasize philanthropic spirit,” The Dallas Morning News (6-28-13)
- “Four mayors discuss philanthropy in Dallas,” FrontBurner (6-27-13)
- “Texans master the art of giving back,” The Dallas Morning News (6-24-13)
- “Communities Foundation turns 60,” The Dallas Morning News (2-16-13)
- “Foundation distributed $66 million in 2012,” The Dallas Morning News (2-7-13)
- “Communities Foundation of Texas distributed $66 million in grants in 2012,” Turtle Creek News (1-18-13)
- “CFT Announces $66 million in grants,” Texas Nonprofits (1-16-13)
- “Charitable Giving: Not Just for the Ultra-Rich,” The Dallas Morning News (11-11-12)
- “Plano resident matches donors to charities,” Plano Star Courier (5-6-12)
- “Communities Foundation awarded $79M last year,” Park Cities People (3-23-12)
- “CFT Grants reach out to community” The Dallas Morning News (3-2-12)
- “Foundation distributed $66M in 2012,” The Dallas Morning News (1-7-12)
- “Local Collectors Donate Paintings to Charity,” Turtle Creek News (9-2-11)
- “The Caruths’ Legend,” Park Cities News (7-21-11)

Donor-Advised Funds

- “Haircuts lift spirits at The Bridge,” The Dallas Morning News (3-15-13)
- “Welcome to Mack’s: Good Hair Days Ahead,” The Bridge publication (9-12-12)
- “Kit Moncrief: Pet Adoption Advocate,” Fort Worth Magazine (9-12-12)
- “HP Alumnus Clayton Kershaw making a difference with Kershaw’s Challenge,” Neighbors Go Park Cities (8-24-12)
- “HP alumnus Clayton Kershaw makes pitches for fundraiser,” NeighborsGo.com (8-24-12)
Furthering Philanthropy

North Texas Giving Day provides a strong platform for furthering the common understanding of CFT as a trusted partner for community knowledge and collaboration. In 2011, 2012, and 2013, CFT’s team provided massive nonprofit support through two kickoffs, several marketing workshops, a webinar and a marketing toolkit, and frequent emails on updates, tips, and direction.

North Texas Giving Day 2011’s event beat the amount raised in the past two years combined, raising $10.7 million for 600+ nonprofits. Coverage included TV (WFAA’s PSA, Good Morning Texas), news stories across 16 counties, every local calendar listing, and every radio show, resulting in 4.5 million impressions. More than 300 nonprofit marketers attended CFT’s social media workshops in Dallas and Ft. Worth and walked away with content strategy, a sharable brand video, and grassroots branding tools to tie together everyone’s work across email, Facebook, Twitter, YouTube, and flickr. The workshops gave hundreds of nonprofits the ability to wage their own personalized Giving Day campaigns by using postcards, newsletters, email, and video. The combination of these efforts expanded the DonorBridge social network from 80 fans in 2010 to 1,200 in 2011 and increased the overall number of donations from 7,900 to 13,500 for the one-day event. A unique element in 2011 was the intense crisis management and recovery required. CFT Communications led crisis management through ongoing real-time updates to the press, nonprofits, donors, and board members. Minute-by-minute social-media monitoring was particularly helpful in providing complete transparency and open dialogue among DonorBridge, donors, and nonprofits. In addition, CFT Communications led preparations for two nonprofit town halls and an apology letter for the website and email distribution.

North Texas Giving Day 2012 beat not only its own previous-year results but also the national record—closing at $14.4 million, a 35 percent increase over 2011. More nonprofits benefited than ever before, with 900 receiving donations, a 30 percent increase over last year’s 600. Perhaps most impressive was the number of donations made this year: 37,800 donations; a 180 percent increase over the past year’s volume of donations. North Texas Giving Day surpassed the national record at 10:36 p.m. with $14.1 million raised, unseating Minnesota, the prior reigning champ, which had raised $14 million.

2012 North Texas Giving Day and CFT received significant press coverage (Texas Press Clippings 4.7 million impressions), thanks to announcements sent to more than 200 press contacts across the 16-county region tailored for Tarrant, Denton, Collin, and Dallas counties. The second annual Good Morning News “Parade of Causes” showcased dozens of nonprofits to build pre-event excitement. On-air and print interviews before, during, and after the event were conducted with The Dallas Morning News, Fort Worth Star-Telegram, KLIF-AM, KRLD-AM, Plano Star Courier, WBAP-AM, WRR-FM, WFAA-TV, University of Texas at Dallas’ Shorthorn and University of Dallas’ University News. On-site “donation stations” and a giving celebration provided the public relations team with pitch material for day-of photo ops and broadcast coverage. In addition to WFAA-TV being on site, WBAP, KRLD, and KLIF covered the event; KTVT CBS 11, CW 33, and KXAS NBC 5 are reported to have mentioned the event in their newscasts; and LNS sent a camera to capture the on-site festivities. The Dallas Morning News, D Magazine’s Frontburner, KERA/KXT/ArtSeek, and MySweetCharity made regular updates on their websites/blogs about donation progress.
North Texas Giving Day 2013 once again raised the “giving day” bar by not only surpassing its own previous-year results but by also setting the national record. 2013 donations totaled $25.2 million, a 75 percent increase over CFT’s record-breaking $14.4 million in the previous year. Also noteworthy was the volume of donations, which nearly doubled, with 1,351 nonprofits benefiting from more than 75,000 donations. North Texas Giving Day 2013 surpassed the national record at 6:30 p.m., when the event reached $17 million raised, unseating Minnesota, the prior reigning champ, which had raised $16.4 million in its statewide event.

A supporting measure of the 2013 success is the amount of exposure North Texas Giving Day and CFT received through earned media—or press coverage—resulting from public relations. Texas Press Clippings reported that these efforts led to 5.5 million impressions (that is, the number of people who could have seen the coverage). These figures are conservative; some impressions and media values for some coverage are missing. The media sponsorships negotiated with three CBS radio stations (KVIL, KLUV, and JACK FM), WFAA, The Dallas Morning News, CBS Outdoor, and MySweetCharity resulted in an additional value of ~$100,000 worth of broadcast spots, digital outdoor advertising, and print ads. The 2013 success can also be attributed to the increased number of nonprofits participating; the grassroots marketing efforts by nonprofits; the increase in social media and press coverage (including coverage from media sponsors); and CFT’s efforts to “take North Texas Giving Day to the streets” with downtown flash mobs, nonprofit performances, and in-person donation stations. Additionally, technical operation was seamless with very minor server issues, making the user experience easy and resulting in a focus on increasing donations rather than crisis communications.
**Giving Guide.** The Giving Guide changed its focus from 2010 to 2013. Originally, it was meant to be a tool for donor-advised fund holders in their local grantmaking. In 2010–11, it was publicized as an opportunity through the CFT newsletter and personal phone calls. The results of the Giving Guide matches made were summarized in *The Dallas Morning News* and the CFT newsletter. In 2011–12, the same approach was taken, with an added focus on social-media communication. In 2012–13, a significant effort was devoted to further awareness of CFT’s Giving Guide as a grantmaking tool through tailored cover letters and direct-mail pieces targeted to donors, advisors, private foundations, friends, and prospects. The 2012 strategy was to seed media placements featuring Florence Shapiro and three or more local nonprofits in each of 11 neighborhood papers.

After completing focus groups assembled to better understand the role of the Giving Guide as a tool for donors and prospects, the team evolved a Giving Guide for 2014 that better demonstrates CFT’s customized grantmaking services. CFT will also no longer seek specific media coverage for the Giving Guide as a tool on its own. Focus groups also helped the team to revise expectations of direct nonprofit fundraising that the Giving Guide can produce.

**Disaster Relief.** CFT has continued to evolve disaster-relief response efforts, including protocols to note response suggestions on social media and online and/or create relief fund pages across 8+ disaster efforts between March 2011 and December 2013. In 2013, the Texans for West campaign that was raising funds through CFT gained significant media coverage in *Culture Map*, *Yelp*, *DallasNews.com*, *Dallas Observer*, *Collin County Courier*, *ATT PAC.com*, *Advocate Magazine*, *MySweetCharity*, and several other local blogs. CFT has continued disaster-relief support with ongoing coverage through newsletter articles about the Mass Care Taskforce, an annual report feature on the Neiman Marcus disaster relief fund, and frequent timely updates through social media.

The Texans for West concert took place at Klyde Warren Park and raised $30,000 for the West disaster victims.
Selected Media Coverage of CFT’s Initiatives to Further Philanthropy

North Texas Giving Day

- “North Texas Giving Day Raises $4k per Minute,” The Dallas Morning News (9-20-1)
- “North Texas Giving Day Shatters Records,” White Rock Lake Weekly (9-20-13)
- “North Texas Giving Day Shatters Records,” Allen Statesman (9-20-13)
- “Donor Bridge hopes to set giving record,” The Dallas Morning News (9-9-13)
- “Sounding Off: Community Opinions, North Texas Giving Day,” The Dallas Morning News (9-21-12)
- “Sounding Off: Community Opinions, North Texas Giving Day,” The Dallas Morning News, Neighbors Go Richardson (9-21-12)
- “Sounding Off: Community Opinions, North Texas Giving Day,” The Dallas Morning News, Neighbors Go Irving (9-21-12)
- “Sounding Off: Community Opinions, North Texas Giving Day,” The Dallas Morning News, Neighbors Go Best Southwest, Grand Prairie, Oak Cliff (9-21-12)
- “Sounding Off: Community Opinions, North Texas Giving Day,” The Dallas Morning News, Neighbors Go Park Cities (9-21-12)
- “North Texas Giving Day generates $14.4 million for 900 Dallas-area nonprofits,” The Dallas Morning News (9-14-12)
- “4th Annual Giving Day Is Sept. 13,” The Dallas Morning News (9-5-12)
- “Giving Day donations shatter expectations,” The Dallas Morning News (9-30-11)
- “Over $5 million raised on North Texas Giving Day,” The Dallas Morning News (10-11-10)

Giving Guide

- White Rock Lake Weekly ran a front-cover feature with photo from the Dallas Arboretum in the double issue the week of Christmas and through New Year’s Day and ran online on 12-21-2012.
- “How do you recapture the magic of the holidays? Make a difference” CultureMap Dallas (12-7-12)
- “Communities Foundation of Texas’s Giving is a Treasure According to Sen. Florence Shapiro,” MySweetCharity (12-6-12)
- WFAA-TV Good Morning Texas segment, (11-29-12)
- Media coverage on the Giving Guide included custom bylined stories that appeared online on 11-20-12, including White Rock/East Dallas NeighborsGo, Plano-Murphy-Wylie NeighborsGo; Allen-McKinney-Frisco NeighborsGo; Carrollton-Farmers Branch-McKinney NeighborsGo; Garland-Mesquite NeighborsGo; Richardson-Lake Highlands-Far N. Dallas NeighborsGo; Best Southwest (Oak Cliff/Grand Prairie) NeighborsGo; Rockwall-Roylett NeighborsGo; Irving-Coppell NeighborsGo; ParkCities NeighborsGo. Print versions of these stories ran in the Allen-McKinney-Frisco NeighborsGo and in the Plano Neighbors Go.
- “Gifts that keep on giving—to others,” The Dallas Morning News (12-3-11)
- “Charitable Giving: follow your heart, use your head.” White Rock Lake Weekly Online (1-5-12)
- “Here’s How to Find Meaningful Gifts,” The Dallas Morning News (12-2-11)
- “The Child Abuse Prevention Center was mentioned in the Communities Foundation of Texas’ 2011 Giving Guide,” CAPCenter Twitter (12-1-11)
- “Matching Donors, Recipients,” The Dallas Morning News (3-23-11)
Furthering Philanthropy: North Texas Giving Day

North Texas Giving Day was established by Communities Foundation of Texas in 2009 in partnership with the Center for Nonprofit Management and The Dallas Foundation. The idea was to increase giving to the region’s nonprofits by motivating people to give to one or more vetted charities through a particular website on a single day by offering matching funds as an incentive. Nonprofits created profiles on the website by submitting detailed information on their operations, budgets, leadership and effectiveness. CFT and the Center for Nonprofit Management staff members then reviewed the information and approved most, but not all, charities. The first Giving Day raised about $4 million for about 300 nonprofits.

North Texas Giving Day has since become an annual fundraising juggernaut that has pumped nearly $60 million into the community. In 2013, 1,350 nonprofits (up 46% from 2012) received grants totaling $25.2 million (up 75% for $14.4 million in 2012). They ranged from A to (almost) Z (Aberg Learning Center to YW of Dallas) and their gifts ranged from 1 (for $25) to 1,800 (totaling more than $180,000). The aggregate number of gifts nearly doubled to 75,000 – and came from all 50 states and 35 countries.

Twenty-six percent of the donors reported that they were making their first gift to the nonprofit chosen. Eighty-nine percent of gifts were a $250 or less. Fifty percent of donors made gifts to more than one nonprofit (up from 21% the previous year).

Sixty prizes (ranging from most donors for a first time participating agency, to the largest increase in donors to the best integrated marketing campaign) were awarded totaling $162,000. Each gift earned 6.4% bonus – totaling $1.5 million in bonus funds.

Giving Day participant feedback. Annually, CFT seeks feedback from the nonprofits participating in North Texas Giving Day. In 2013, nonprofits reportedly liked the ease of use of the software, availability of reports, real time tracking via the leaderboard, activities at CFT, length of the day, speedy follow-up with checks, workshops for nonprofits, hourly prizes, sense that the entire community was in it together, visibility the day afforded the nonprofits in the press and that the day attracted new donors.

Statistically we found that:

- Fifty-nine percent of respondents were very satisfied or extremely satisfied with the operation and results on Giving Day, with only 10% rating themselves between neutral and not satisfied
- Seventy-two percent were very likely or extremely likely to recommend participating in Giving Day to another nonprofit – with only nine percent saying they were somewhat or very unlikely to recommend participation
- Ten percent of organizations secured their own matching funds to supplement the day’s prizes and bonus funds, and 15 percent held special events.
Some positive thoughts on North Texas Giving Day:

“I LOVED the live feed this year. Made it exciting to our agency and myself as a donor. Was great to see the overall momentum of all the money raised towards all the charities. Definitely fueled me to give. And from a charity perspective to immediately see who won the prizes so we could put it on FB to fuel more giving.”

“We had several donors who previously had only given $25, $50, $100 with maybe $200-$300 in annual totals, but then on DB day, gave $500, $1000. One gave $5500. We are working to follow up with those to learn their story. We also saw a 35% increase in participation from the last time we participated in North Texas Giving Day (skipped 2012 due to a scheduling conflict).”

“We are a very small organization so for us to get over $12,000 was amazing! It was such an encouragement to staff and to donors. It was a boost to us to know people really trust us and believe in what we are doing.”

“Just connecting with donors for such a fun event. Everyone got excited about it.”

“I was very pleased with the donor turnout for our organization, given that we are very small (but the name DonorBridge brought us much needed attention). Thank you!”

“We had a kickstarter campaign last year and raised almost $6,000 but had to pay a major percentage and also pay for gifts and mailing and also a great deal of staff and board time. We made almost 5,000 on giving day this year with only a fraction of staff time and received a bonus instead of paying a percentage.”

“Your marketing strategies as well as our own work fabulously for us. Thank you for all of those resources we could use to garner attention to that specific day. I believe an event could help us raise more funds and visibility on that day. So we need to work more in that direction.”

“At the risk of diluting the bonus monies even further, I’d like to see some organizations that dropped out of participation after the difficulties of the first two years aggressively re-approached to participate in upcoming NTGD campaigns. It’s all operating so smoothly now, it’s a shame some organizations have negative feelings toward the campaign that are out of date with present realities.”

...and some expressing frustration:

“I think it was great to be a part of the event and gives our organization credibility but there were so many organizations listed. Big, medium and small non-profits...I had to search and they were not listed alphabetical. I see can be a disadvantage in some ways.”

“I am concerned that the amount it costs to participate in DonorBridge (6% of donation) in 2014 will decrease our charity’s donations. There is still a lack of clarity that this isn’t a dollar-for-dollar match. Though some of our donors in 2012 didn’t donate in 2013 because they now understand it’s not dollar-for-dollar. The little nonprofits can’t compete with the larger ones to get significant donations (percentage of their budgets). The smaller charities don’t have the marketing budgets to spread the word. The larger charities are benefiting most.”
Furthering Philanthropy: Cause-Minded Conversations

Cause-Minded Conversations bring CFT fund holders together with authors, public sector and nonprofit leaders, and civically engaged community members to learn about and discuss issues relevant to North Texas.

In 2013, the Conversations centered on education, where CFT has particular depth of experience and breadth of expertise. We presented two additional Cause-Minded Conversations – one focused on low income working families and one featuring Dallas mayors discussing 60 years of philanthropy in the city.

The Education series of panel discussions included:

• **Educating Dallas from Cradle to Career**, covering the arc of education from elementary school through higher education and beyond moderated by The Dallas Morning News editorial columnist, William McKenzie.

• **Disruptive Innovation for K-12 Education**, discussing new approaches to public education and beyond, moderated by host of KERA’s critically acclaimed THINK program, Krys Boyd.

• **Transforming Higher Education**, discussing the latest innovations in higher education designed to ensure more college students graduate with a degree or certificate — also moderated by Krys Boyd.

Special presentations included:

• **Generations of Generosity**: To commemorate CFT’s 60th Anniversary, Mayor Mike Rawlings led former mayors Tom Leppert, Laura Miller and ambassador Ron Kirk in a discussion about major Dallas milestones in the city’s growth across the arts, social services, public safety, education and healthcare.

• **A Fighting Chance**: Two presentations – one for nonprofits and one for fund holders -- around the Center for Public Policy Priorities’ documentary A Fighting Chance: What does it take for a family to survive and thrive in Texas? The film follows the lives of five struggling Texas families and shows the tough choices they must make.

  • The session for nonprofits focused on recently released online tools and data available to support struggling families.

  • Fund holders heard from people addressing the issue of asset poverty in the public, private, and nonprofit sectors and thought on ways to raise the visibility of the issue (ultimately leading to the 2014 Cause-Minded Conversation series and cooperative One Crisis Away program with KERA in Dallas).
Furthering Philanthropy: Entrepreneurs For North Texas (EFNT)

EFNT is a program of Communities Foundation of Texas that “makes it easy for North Texas businesses to do good” in the community. Established in the summer of 2000, EFNT’s network of over 100 Member Companies includes early stage, small and mid-size businesses, private equity investors, venture capitalists and a wide range of professional service providers who all have a commitment to give back to the communities in which they live and work.

EFNT assists its Member Companies in harnessing the power of their corporate assets through philanthropy and community programs in order to serve social needs while meeting corporate objectives. For member companies, EFNT identifies the most strategic alliances with nonprofit organizations so that maximum impact on both the company and the community can be achieved. Additionally, EFNT hosts networking events that celebrate corporate philanthropy, tap into the wisdom of accomplished business leaders and provide an exclusive environment for connecting with like-minded good corporate citizens.

EFNT Volunteer Hours

![Freedom Day 2012 at Zumwalt Middle School in Dallas.]
Facilities: A Gift of Space

As another way to serve the community, CFT provides the use of its building space at low or no cost rates to its nonprofit grantees throughout the year. Many nonprofits do not have available facilities for conducting large-scale meetings in a new and fresh environment. Also, our meeting and special-events coordinator and the facilities team serve as “supplemental staff” for these organizations to help them with planning, logistics, day-of event execution, and building management. The ability to use CFT’s space at a minimal cost for key events saves nonprofits thousands of dollars annually across the North Texas region.

For fiscal year 2013, CFT’s facilities team managed 400+ events, bringing nearly 20,000 people through its doors to attend strategic meetings, conferences, ceremonies, and luncheons.

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Field Leadership 2013

Through participating in conferences and serving on the boards of philanthropic infrastructure organizations we enhance our leadership position in philanthropy. A review of the recent speaking opportunities and board memberships that CFT’s staff participated in illustrates the variety of local and national settings where we had opportunities to advance the goals of our program areas and bring attention to important elements of our work.

<table>
<thead>
<tr>
<th>Organizer</th>
<th>Title/Topic</th>
<th>CFT Staff Member</th>
<th>CFT’s Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Funders Network Conference</td>
<td>Community-Based Asset Building: Community Foundations as the New Asset Advocates</td>
<td>Wende Burton</td>
<td>Speaker</td>
</tr>
<tr>
<td>Association of Fundraising Professionals Annual Conference</td>
<td>Trends in Philanthropy: Time to Tax Charitable Gifts?</td>
<td>Brent Christopher</td>
<td>Speaker</td>
</tr>
<tr>
<td>Association of School Curriculum and Development</td>
<td>Project Based Learning</td>
<td>Reo Pruiett</td>
<td>Presenter</td>
</tr>
<tr>
<td>CFED Assets &amp; Opportunity Leadership Convening</td>
<td>Getting Asset Poverty Work Funded</td>
<td>Sarah Cotton Nelson</td>
<td>Panelist</td>
</tr>
<tr>
<td>Excelencia in Education Conference</td>
<td>Using Data to Drive College Readiness and Access for Latino Students</td>
<td>Dee Chambliss</td>
<td>Presenter</td>
</tr>
<tr>
<td>Ford Foundation: Grantee Conference in Bogota, Columbia</td>
<td>Collective Impact Across the Globe</td>
<td>Chris Coxon</td>
<td>Speaker and Invited Participant</td>
</tr>
<tr>
<td>George Bush Institute</td>
<td>Middle School Matters</td>
<td>Alma Garcia</td>
<td>Presenter</td>
</tr>
<tr>
<td>Grantmakers for Education</td>
<td>Metrics and the Rio Grande Valley Collective Impact Initiative</td>
<td>John Fitzpatrick</td>
<td>Panelist</td>
</tr>
<tr>
<td>Hispanic, Engineering, Science, and Technology Conference</td>
<td>STEM and ECHS Hispanic Students: Access and Readiness</td>
<td>Reo Pruiett</td>
<td>Panelist</td>
</tr>
<tr>
<td>Texas Legislative House and Senate Public Education and Higher Education Committees Jan–May 2013</td>
<td>House Bill 5-Post-Secondary Student Success-Texas Teaching Commission</td>
<td>John Fitzpatrick</td>
<td>Speaker</td>
</tr>
<tr>
<td>McQuistion Television Show</td>
<td>Charitable Deduction Changes: A Tax Increase on Charity?</td>
<td>Brent Christopher</td>
<td>Panelist</td>
</tr>
<tr>
<td>Minority Serving Institutions Funders Group</td>
<td>Postsecondary Student Success Initiatives</td>
<td>Melissa Henderson</td>
<td>Presenter</td>
</tr>
<tr>
<td>National Action Council for Minority Engineers</td>
<td>T-STEM Academies and partnerships Underrepresented</td>
<td>Reo Pruiett</td>
<td>Panelist</td>
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<tr>
<td>National Association of Latino Elected and Appointed Officials</td>
<td>Innovative High Schools: ECHS Promoting College</td>
<td>Alma Garcia</td>
<td>Presenter</td>
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<tr>
<td>National Early College High School Conference</td>
<td>Greater Texas Foundation ECHS Scholarship Program</td>
<td>Alma Garcia</td>
<td>Presenter</td>
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<tr>
<td>National Science Teachers Association</td>
<td>STEM Education</td>
<td>Reo Pruiett</td>
<td>Panelist</td>
</tr>
<tr>
<td>Event</td>
<td>Topic</td>
<td>Presenter</td>
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<tr>
<td>San Antonio 2020</td>
<td>Collective Impact</td>
<td>George Tang</td>
<td>Presenter</td>
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<tr>
<td>Texas Lyceum</td>
<td>State of Texas Philanthropy</td>
<td>George Tang</td>
<td>Presenter</td>
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<tr>
<td>Texas State Board of Education</td>
<td>House Bill 5</td>
<td>John Fitzpatrick</td>
<td>Oral testimony</td>
</tr>
<tr>
<td>The Philanthropy Roundtable annual conference</td>
<td>Private Charity and a Robust Civil Society</td>
<td>Brent Christopher</td>
<td>Moderator</td>
</tr>
<tr>
<td>US News and World Report</td>
<td>Texas ToolKit for STEM Education</td>
<td>Reo Pruiett</td>
<td>Panelist, Presenter</td>
</tr>
<tr>
<td>US Secretary of Education Arne Duncan Town Hall Meeting</td>
<td>T-STEM Early college High School- El Paso ISD &amp; El Paso Community College District</td>
<td>John Fitzpatrick</td>
<td>Moderator</td>
</tr>
<tr>
<td>UTSW Global Health Conference</td>
<td>Transformative Global Health: Impact and Accountability</td>
<td>Sarah Cotton Nelson</td>
<td>Speaker</td>
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</tbody>
</table>

**Boards, Advisory Groups and Planning Committees**

<table>
<thead>
<tr>
<th>Organization</th>
<th>CFT Staff Member</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Council on Foundations, CommA Steering Committee</td>
<td>Carol Goglia</td>
<td>Member</td>
</tr>
<tr>
<td>Alliance for Charitable Reform, Strategy Committee</td>
<td>Brent Christopher</td>
<td>Member</td>
</tr>
<tr>
<td>Annette Caldwell Simmons School of Education and Human Development at SMU</td>
<td>Brent Christopher</td>
<td>Executive Board</td>
</tr>
<tr>
<td>Bill and Melinda Gates Foundation Educational Completion Market Segmentation Analysis Team</td>
<td>George Tang</td>
<td>Member</td>
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<tr>
<td>CF Insights</td>
<td>Brent Christopher</td>
<td>Advisory Board Chair</td>
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<tr>
<td>Conference of Southwest Foundations</td>
<td>Brent Christopher</td>
<td>Board of Directors</td>
</tr>
<tr>
<td>Data Support Councils, Commit! Dallas and RGV Focus</td>
<td>Kristin Kuhne</td>
<td>Member</td>
</tr>
<tr>
<td>National Science Teachers Association, STEM Forum 2014 New Orleans</td>
<td>Reo Pruiett</td>
<td>National Chairperson, STEM Partnership</td>
</tr>
<tr>
<td>North Texas Asset Funders Forum, Steering Committee</td>
<td>Sarah Cotton Nelson</td>
<td>Founding Member</td>
</tr>
<tr>
<td>Strive Together National Advisory Board</td>
<td>George Tang</td>
<td>Board Member</td>
</tr>
<tr>
<td>SXSW edu LAUNCH Advisory Board</td>
<td>George Tang</td>
<td>Board Member</td>
</tr>
<tr>
<td>Texas P-16 Council</td>
<td>John Fitzpatrick</td>
<td>Board Member</td>
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<tr>
<td>Texas Higher Education Coordinating Board</td>
<td>Alma Garcia</td>
<td>ECHS and College Access Steering Committee</td>
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<tr>
<td>University of Texas at Dallas, Diversity Advisory Council</td>
<td>Dee Chambliss</td>
<td>Council Member</td>
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<tr>
<td>UNT Dallas 21st Century Commission</td>
<td>Brent Christopher</td>
<td>Member</td>
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<tr>
<td>US News STEM Solutions Conference</td>
<td>Dee Chambliss</td>
<td>Organizer</td>
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<tr>
<td>Western Governor’s University-Texas Advisory Board</td>
<td>John Fitzpatrick</td>
<td>Advisory Board Member</td>
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<tr>
<td>Zero to Five Collaborative</td>
<td>Sarah Cotton Nelson</td>
<td>Evaluation Chair</td>
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</table>
### Key Conference and Events Held at Communities Foundation of Texas

<table>
<thead>
<tr>
<th>Event</th>
<th>Sponsor/Host</th>
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</thead>
<tbody>
<tr>
<td>High Net Worth Philanthropy</td>
<td>Bank of America</td>
</tr>
<tr>
<td>4th Annual Children’s Summit: The Future of Our Children</td>
<td>Children at Risk</td>
</tr>
<tr>
<td>Racial Justice Leadership Institute for Philanthropic Leaders</td>
<td>Dallas Faces Race</td>
</tr>
<tr>
<td>Philanthropy in Dallas through Public/Private Collaboration: Mayor’s</td>
<td>Communities Foundation of Texas</td>
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<tr>
<td>Public Education</td>
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<tr>
<td>Summary of the 83rd Legislative Session: Legislation Affecting Public</td>
<td>Texas Education Grantmakers Consortium</td>
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<tr>
<td>Public Education</td>
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<tr>
<td>Charitable Impact and the Nonprofit Marketing Double-Standard with</td>
<td>Communities Foundation of Texas</td>
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<tr>
<td>Dan Pollatta</td>
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<tr>
<td>Supporting America’s Cities with Citigroup CEO Mike Corbat</td>
<td>Citi</td>
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</table>

### Awards & Recognition

<table>
<thead>
<tr>
<th>Board</th>
<th>CFT Staff Member</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dallas Business Journal</td>
<td>CFO of the Year</td>
<td>Beth Bull</td>
</tr>
<tr>
<td>Dallas Business Journal</td>
<td>40 Under 40</td>
<td>Sarah Cotton Nelson</td>
</tr>
<tr>
<td>Dallas Morning News</td>
<td>100 Best Places to Work</td>
<td>Communities Foundation of Texas</td>
</tr>
<tr>
<td>North Texas Food Bank’s Dishing</td>
<td>Innovator of the Year</td>
<td>Communities Foundation of Texas</td>
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<tr>
<td>out Gratitude Awards</td>
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<tr>
<td>Presbyterian Communities &amp;</td>
<td>Each Moment Matters Honoree</td>
<td>Jennifer Clifford</td>
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<tr>
<td>Services Foundation</td>
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<tr>
<td>PRNews Nonprofit Marketing Awards</td>
<td>Fundraising Category Winner</td>
<td>North Texas Giving Day Team</td>
</tr>
</tbody>
</table>
ENHANCING THE EXPERIENCE AND IMPACT OF GIVING THROUGH:

Exemplary service;
Wise stewardship of resources; and being a
Trusted partner for community knowledge and collaboration.

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