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Letter from the CEO

Recently, a husband and wife described their outlook on giving back in these very simple terms:

"Both of us were fortunate to grow up with parents who taught us some tremendously important values. Work hard. Show respect. Have a sense of humor.

"And if life happens to bless you with talent or treasure, you have a responsibility to use those gifts as well and as wisely as you possibly can.

"Now we hope to pass this example on to our own children."

That sounds like it could be the perspective of someone you know personally. Your next door neighbors. Or maybe your close friends. Or maybe you.

In fact, it's the perspective of the founders of the largest foundation in the world (one of whom actually might have been your neighbor when she was growing up in Dallas). Bill and Melinda Gates shared these thoughts as they recently signed the Giving Pledge, an initiative that they organized with their friend, Warren Buffett. All of the Giving Pledge signers have publicly pledged to give away at least half of their wealth for the benefit of the charitable causes that are most important to them.

CFT received 350 submissions in eight different categories (Animals, Arts, Education, Environment, Elderly, Health, Social Services and Youth) during the 2010 summer and fall application periods.

Meanwhile, CFT’s donors consistently seek thoughtful ways to invest charitable assets in the community. The foundation works every day with donors to empower their philanthropy, translating hearts for giving into support for the most pressing needs in this region.

At the intersection of need and generosity, CFT deepens the impact of giving for our donors by connecting them with pressing needs of area nonprofit organizations.

To help accomplish that goal, a CFT Giving Guide is included with this newsletter.

The Giving Guide is one output of the Letter of Inquiry (LOI) process, a new donor-nonprofit matchmaking initiative, launched in July.

North Texas is home to many nonprofits providing for people in need and enriching our community every day. In turn, these nonprofits count on community support to fill funding gaps and help expand services to meet demand. During the recent downturn in the economy, raising needed financial support for nonprofits has proven tougher than ever.

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CFT’s Letter of Inquiry process and Giving Guide

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A Tie To The Past, Pointing To The Future

A proud legacy can serve as an example from the past and inspiration for the future. This certainly is true of the Caruth family, and there is no clearer symbol of the Caruth family legacy than the newly renovated and restored Caruth Homeplace.

This noteworthy property is a fitting physical tribute to the Caruth family’s role as a long thread in the fabric of Dallas history, while providing a new home to the Summerlee and Hoblitzelle foundations.

The Caruth Homeplace dates back to 1852 and pioneer settler William Barr Caruth. Throughout its life, the Homeplace has served as everything from home to the Caruth family to headquarters for farming and ranching operations of more than 30,000 acres. At its peak, the operations encompassed most of what is now central Dallas, stretching from downtown to Forest Lane.

In 2000, CFT acquired the property with plans to preserve the Homeplace. Ultimately, CFT has been able to tell the
Transforming Donor Interests into Positive Community Impact

Continued from Page 1

“Our goal is for CFT to be a hub for collaboration between donors, nonprofits and civic leaders to stimulate creative solutions to key community challenges,” said Sarah Nelson, Chief Philanthropy Officer. “Just as we have asked local nonprofit agencies to tell us about their wishes, we want donors and advisors to let us know of their own philanthropic goals and dreams. In this way, we can support the very best philanthropic investments in the community by bringing the two forces for good together.”

Submissions via the LOI process are screened by foundation staff, and those evaluated as strong funding opportunities are shared with donors, according to donors’ self-identified interest areas. CFT trustees have also set aside a portion of the foundation’s discretionary funds this year to support the LOI program in its launch phase.

If you are interested in funding one of these worthy applicants, or simply want to learn more about it, please review the sampling of opportunities in the special insert – the CFT Giving Guide – included with this newsletter. You can also find a complete listing of participating organizations and a summary of requests on the Giving Guide page at the CFT website (www.cftexas.org). For more information on any of the requests listed, or if you are interested in funding a particular request, please contact Monica Egert Smith in the Philanthropy Department at grants@cftexas.org or 214-750-4222.

A Tie To The Past, Pointing To The Future

Continued from Page 1

Caruth family story, ensure a low impact on the surrounding neighborhood and provide a home for charitable foundations. The lease payments from the two foundations housed on the property, along with an endowment from the family, support a break-even budget for maintenance and operation of the property.

“The history of the Caruth family is intertwined with that of Dallas and of Communities Foundation of Texas. CFT is proud to share this part of our city’s history to help current and future generations celebrate the contributions of the Caruth family to the North Texas area,” said Linda Pitts Custard, a former CFT trustee and chair of the building committee who shepherded the restoration from beginning to end.

As both business and community leaders, the Caruth family provides a telling glimpse into the history of Dallas. And perhaps most importantly, the family supported their community through a history of philanthropic commitments and endowments — many managed today by CFT. The list of Caruth donations and investments in Dallas is long, including recent grants through the W.W. Caruth, Jr. Foundation of CFT supporting innovative approaches to public safety, education and medical research in Dallas.

Making a home for two charitable foundations within the Homestead is a fitting continuation of the Caruth family’s legacy. “The two private foundation tenants are committed to improving the lives of North Texans much as the Caruth family demonstrated by their philanthropy” said Brent Christopher, President and CEO of Communities Foundation of Texas. “CFT worked diligently to come up with a plan that would preserve the Caruth home and allow the property to be used in a way that honors the legacy of the Caruth family. We feel that the restoration of this historic homestead truly honors their commitment to the community.”

Happy holidays.

Brent E. Christopher
President and Chief Executive Officer

A total of 350 submissions for funding in 8 different categories were received during the 2010 summer and fall application periods.
Year-End Giving During Uncertain Times
Philanthropy continues as donors think strategically about giving

Tax considerations are not the primary motivation when making philanthropic decisions, yet another year of uncertainty surrounding tax law revisions and extraordinary economic instability makes charitable year-end planning more important than ever.

As you reflect on year-end giving, we understand the inclination to be cautious and selective. The year has seen continued market turbulence, and charitable organizations face increasingly challenging times as needs in the community grow even more. As you think strategically about your philanthropy, now may be an ideal time to gift long-term securities that may have dropped in value, but still have appreciation with tax consequences.

Due to favorable tax provisions and with careful planning, a year-end gift of securities held for more than one year would enable you to claim an income tax deduction on the fair market value and also avoid capital gains tax on the appreciation.

<table>
<thead>
<tr>
<th>Type of Gift</th>
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<th>Stock</th>
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<td>$50,000</td>
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<tr>
<td>Income tax savings (33% tax bracket)</td>
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<tr>
<td>Capital gains tax savings (15% x $40,000 gain)</td>
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</tr>
<tr>
<td>Net cost of gift</td>
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<td>$27,500</td>
</tr>
</tbody>
</table>

To illustrate the benefits of gifting appreciated securities, assume you want to give $50,000 to CFT before year-end, which can be funded either with cash or appreciated stock. You are in the 33 percent income tax bracket, and the stock value is $50,000 with a cost basis of $10,000. Because you have held the stock more than a year, your charitable deduction would be based on the fair market value on the gift date. By using the appreciated stock instead of cash, you save an additional $6,000 (see table). A higher federal tax bracket would further improve your results.

The federal government encourages charitable giving by allowing you to deduct up to 30 percent of adjusted gross income each year when a gift is made of appreciated securities. In addition, if you are unable to use the entire amount of the allowable deduction in one year, the excess tax deduction can be carried over for five additional years. On the other hand, if you are holding securities that have depreciated in value, it may be best to sell them, write off the loss and establish or add to a fund with the proceeds.

Let Us Know When You Give Stock
The transfer of securities to Communities Foundation of Texas is one of the best ways to be charitable. But the foundation does not automatically learn the name of the donor when a stock transfer is made to our brokerage account. So, when gifting stock to the foundation, please call Steve Orr, Vice President, Investments, or Kristine Thomas, Vice President, Accounting, at (214) 750-4222.

Year-End Is Almost Here
To learn more about how CFT can help you achieve your charitable goals, call Jackie Franey or Roman Herrington at (214) 750-4222, or e-mail at jfraney@cftexas.org or rherrington@cftexas.org.

CFT does not provide legal or tax advice and advises you to seek your own legal and tax advice in connection with all charitable and planning matters.
Communities Foundation of Texas strives to ensure that its grants accomplish the greatest positive impact possible. This is particularly true for CFT’s discretionary grantmaking.

A strategic plan finalized by the trustees in 2009 set a new goal for CFT discretionary grantmaking: be an effective voice in the community on critical needs by bringing greater focus to CFT’s discretionary grants. In June, the foundation’s trustees participated in a board retreat to review key needs and challenges across the community and determine where CFT’s discretionary grantmaking could have a significant measurable impact. After careful consideration, the board selected two areas for proactive discretionary grantmaking during the next several years: 1) enhancing economic security for the working poor and 2) improving high school graduation and retention rates by investing in at-risk middle school youth.

Recognizing the complex challenges in these two areas, CFT enlisted FSG Social Impact Advisors (FSG) to help the foundation more fully understand the grantmaking opportunities in our area. FSG is a nonprofit consulting and research firm recognized as a thought leader in philanthropy and corporate social responsibility. As part of its analysis for CFT, FSG conducted 30 interviews with CFT trustees and staff, local funders, nonprofit providers, and national experts in the two focus areas; analyzed the current state of at-risk middle school youth and the working poor in Dallas; and summarized research-based national best practices as models for CFT. Their findings include:

**Working Poor**

In Dallas, and South Dallas particularly, the population of working poor individuals and families continues to grow. Current trends suggest the working poor’s situation is worsening due to a weaker economy and fewer job and training opportunities. The working poor are a diverse group with misconceptions about its willingness to work, social composition, and dependence upon government assistance. “Working poor” is generally defined as 1) a household (individual or family) earning less than 200% of the federal poverty line – $21,660/year for an individual and $44,100/year for a family of four with two kids – and 2) where one member of the household has spent at least 27 weeks in the labor force working or looking for work in the last year.

Challenges facing the working poor’s ability to improve their circumstances include:

- A lack of education and job readiness; resulting in the inability to earn more or be considered for higher wage jobs
- Being unbanked and having insufficient financial literacy; leading to a vulnerability to predatory lending and an inability to establish lines of credit or build assets
- Insufficient affordable housing options; resulting in a greater portion of income dedicated to housing and lower investments in education, nutrition and healthcare
- Difficulty accessing health insurance; creating a fragile environment where an unexpected illness or accident can be financially catastrophic to a household.

**At-Risk Middle School Youth**

The population of at-risk middle school youth in the Dallas area is approximately 75,000 students (48% of the middle school population). “At-risk” youth are those more likely to encounter difficulties in their academic, family, or social lives, engage in drug or alcohol abuse, leave home, or commit crimes and become incarcerated. High-impact interventions with this group can provide positive long-term effects. Improvement in middle school achievement is the best proven predictor of college and career readiness in 11th and 12th graders.

Research shows three main reasons for low levels of student achievement in middle school:

- Academic performance; low levels of achievement and high dropout rates significantly decrease the likelihood of graduating from high school
- High risk behaviors; engagement in risky behaviors often result in poor retention and academic achievement
- Difficult conditions outside of school; youth whose basic needs are not being met have a much more challenging time academically

This enhanced understanding of each focus area will guide the grantmaking direction of CFT trustees and staff as they continue to explore how best to utilize the foundation’s discretionary dollars. Please look for additional information on CFT’s new discretionary grantmaking strategy and funding focus areas early next year at www.cftexas.org, and in the spring edition of the IMPACT newsletter.
DonorBridge Sets New Giving Record

More than $5 million donated to local charities in only 12 hours on North Texas Giving Day

In just 12 hours, more than 7,000 generous North Texans got up and gave to their favorite nonprofit organizations in celebration of Get Up and Give! North Texas Giving Day.

The results far exceeded expectations and set a new Giving Day record: including the $750,000 in matching funds and prizes, $5,050,000 was donated to 500 organizations across the area.

The second North Texas Giving Day, an event developed by Communities Foundation of Texas in partnership with the Center for Nonprofit Management and The Dallas Foundation, aims to demonstrate the broad community support for vital nonprofits by driving people to give via DonorBridge (donorbridgetx.org), a searchable website connecting people who want to give their time or money to the nonprofit organizations in North Texas fitting their interests.

“The people of North Texas continue to set a high bar nationally for investing in their community,” said Brent Christopher, president and CEO of Communities Foundation of Texas. “Last year, North Texans gave an amazing $4 million on the first Giving Day; we had no idea that the number would not only increase this year, but far surpass last year by more than a million dollars! It just reinforces how charitable and engaged our community is.”

Communities Foundation of Texas, The Rees-Jones Foundation, The Meadows Foundation and an anonymous donor made $700,000 available in matching funds, and The Dallas Foundation contributed $50,000 in prize incentives.

With the $700,000 in matching funds divided by the total 12-hour donation amount of $4,300,000, donations were matched at $.16 on the dollar. As a result of North Texas Giving Day, 60 percent of the agencies with detailed DonorBridge profiles received donations and many more people learned about their work.

Compared with the first Giving Day last year, the size of the average donation rose from $400 to $545.

“North Texas Giving Day was such a success,” said Mary Jalonick, president of The Dallas Foundation. “The fact that we were able to raise more than $5 million is a tribute to the people in our community. We thank them and look forward to seeing how they will continue to use DonorBridge as their easy resource for connecting with nonprofits.”

“We’re thrilled that North Texas nonprofits received this critically needed support,” said Cynthia B. Nunn, president of the Center for Nonprofit Management. “Get Up and Give allowed us to raise not only much-needed dollars, but also awareness of the important services that nonprofits provide.”

DonorBridge is a dynamic online resource that makes mutual connections between nonprofit organizations, donors and supporters. With the support of Communities Foundation of Texas, The Dallas Foundation and the Center for Nonprofit Management, gathering reliable information, making charitable gifts and addressing community needs will become simpler.

DonorBridge offers information about all U.S. charities, including hundreds of in-depth profiles of North Texas-area nonprofit organizations. Potential supporters can find information about agencies’ operations that, until now, have not been readily available to the public. Each nonprofit has created a custom portrait detailing their mission, programs offered, finances and results. “With DonorBridge, we want to make it easier for people to give wisely,” said Mr. Christopher.

CFT is also pleased to provide support for WFAA-TV’s 41st annual Santa’s Helpers Toy Drive. In 2009, Santa’s Helpers distributed more than 75,000 toys to approximately 50,000 children in our community through nonprofit agencies. CFT processes all cash and online donations made to the campaign, which are then used to buy toys for needy children in the Dallas-Fort Worth area. Agencies are selected to participate in the campaign based on their ability to coordinate applications from needy families using the Salvation Army’s “Holiday Clearinghouse” system, and to adequately serve areas of greatest need.
Important Note - Year-End Grant Recommendations

If you’re planning 2010 year-end grants, please note that donor-advised grant recommendations must be received by Wednesday, December 15, to help ensure grants can be processed by the end of the calendar year. Thank you!

Narcotics Dog Provided to Dallas Police Department by CFT Grant to Safer Dallas, Better Dallas

Jan, a chocolate lab scheduled to be euthanized, was rescued and received five months of training before beginning her service with the Dallas Police Department’s narcotics division. Her incredible journey was made possible by a grant from the Phoebe and Russell H. Perry Fund at CFT to Safer Dallas, Better Dallas to purchase the dog for the Dallas Police Department.
CFT Giving Guide

Here’s your chance to make an immediate impact on our community! This fall CFT solicited, compiled, and reviewed requests for assistance from local nonprofit organizations on critical needs. Each of the 350 requests represents an immediate opportunity to make a difference.

Join CFT and other philanthropists by taking three steps to support one or more of these worthy causes:

**Step 1**
Review the list of requests—the sampling here or the complete list online at www.cfTXas.org.

**Step 2**
Choose the opportunity or need most meaningful for you.

**Step 3**
Make an impact by recommending a grant online or by contacting Monica Egert Smith in the Philanthropy Department at grants@cfTXas.org or 214-750-4222.

This guide includes a sampling of the 350 funding requests received this year in eight areas of interest.

### Animals

**International Exotic Animal Sanctuary**
Dallas—$20,000
Funding will provide operating support for the animal sanctuary, which cares for a tribal of 69 bears and exotic felines. IEAS offers a nationally recognized intern program for college students from across the country pursuing veterinary and zoological degrees.

**Metroplex Animal Coalition**
Dallas—$20,000
Funding will support the coalition’s free spay/neuter program for low-income residents in 17 targeted zip codes within the City of Dallas. M.A.C. is an alliance of more than 50 nonprofit animal welfare organizations in the Dallas/Fort Worth area.

**Society for Companion Animals**
Dallas—$12,672
Funding will support Operation: Transport, a project in which dogs are rescued from the City of Dallas’ animal shelter and transported to other cities with waiting lists of families wanting to adopt rescue dogs. Requested funding will allow for approximately 72 dogs to be flown to Spokane, Washington.

**WildCare Inc.**
Dallas—$20,000
Funding will be used to establish a wildlife triage center providing emergency care and rehabilitation to orphaned, ill and injured wildlife.

### Arts & Culture

**Amon Carter Museum of American Art**
Fort Worth—$5,000
Funding will support the museum’s educator programs, equipping 5,000 teachers and administrators to utilize museum resources and incorporate American art into their lesson plans.

**Children’s Chorus of Greater Dallas**
Dallas—$11,000
Funding will support operating expenses related to the Chorus’ recent expansion and diversification. CCGD currently has 475 4th-12th graders from 38 area cities and 20 school districts singing in its 7 choirs.

**Dallas Children’s Theater**
Dallas—$20,000
Funding will provide production support for a play about teen dating violence that will be presented in February 2011 as one of four “Teen Scene” productions, addressing current teen issues including eating disorders, cyber bullying, learning differences and dating violence.

**Shakespeare Dallas**
Dallas—$20,000
Funding will help offset reductions in city funding from both the Park & Recreation Department and the Office of Cultural Affairs. Shakespeare Dallas serves 50,000 people annually and 70% of its performances are presented on a donation-only basis.

### Education

**AVANCE-Dallas**
Dallas—$20,000
Funding will help replace a $75,000 operating grant from TEA lost as part of state budget cuts. AVANCE provides parenting classes, GED and ESL instruction for adults and early childhood education for children at 23 sites across the Dallas area.

**Dallas After School Network (DASN)**
Dallas—$20,000
Funding will support general operations. DASN works to advance the quality and availability of afterschool programs in our community. DASN is currently comprised of 62 member agencies, collectively serving 30,000 kids.

**Texas Woman’s University Foundation**
Dallas—$20,000
Funding will support the SPRINT (Single Parent Resource, Information, Networking & Technology) program for single mothers enrolled at TWU. The program provides scholarships, child care stipends, laptop computers and networking opportunities to increase the retention rate for these non-traditional students.

**Youth Village Foundation**
Dallas—$20,000
Funding will be used to support Project SAVE (Skills Advancement for Vocational & Education), a set of collaborative programs providing vocational training opportunities for young men currently serving sentences in the Dallas County Juvenile Justice System.

### Elderly

**Presbyterian Communities & Services Foundation**
Dallas—$20,000
Funding will be used to hire an additional educator for the Early Experiences Program in 17 targeted zip codes within the City of Dallas. EEP provides enrichment activities and educational programming for young adults with developmental disabilities.

**Reading & Radio Resource**
Dallas—$20,000
Funding will be used for technology upgrades, allowing the agency to stream programming online and via podcasts to increase accessibility.

**Retina Foundation of the Southwest**
Dallas—$20,000
Funding will support the agency to purchase equipment for the study and diagnosis of macular degeneration. The Retina Foundation currently has this equipment on loan from Pfizer, which can be purchased at a reduced rate.

### Environment

**National Audubon Society**
Dallas—$20,000
Funding will support environmental science education programs at the Trinity River Audubon Center and the Doughnut canyon Audubon Center, serving approximately 20,000 pre-K–5th graders annually.

**Student Conservation Association**
Dallas—$20,000
Funding will be used by SCA’s conservation crews, comprised of low-income high school students participating in hands-on conservation projects in the Dallas area.

**Texas Trees Foundation**
Dallas—$20,000
Funding will allow TTF to hire an Urban & Community Outreach Forestry Manager to create and implement tree planting programs. TTF has received a $30,000 matching grant from the state to support the position.

**Texas Discovery Gardens**
Dallas—$14,017
Funding will be used to hire an additional educator for the Earthkeepers Program during peak periods of the school year, allowing the organization to serve more students, and supplement supplies for take-home activity kits.
**Health**

**American Cancer Society, North Texas Region**  
**Dallas—$20,000**  
Funding will permit the launch of the Patient Navigation Program at Methodist Dallas Medical Center. The program provides support to cancer patients—particularly the elderly, low-income and uninsured, helping them navigate the complex healthcare system and resolve financial difficulties.

**Caring for Children Foundation of Texas**  
**Dallas—$20,000**  
Funding will support the Care Van, a mobile outreach program providing free immunizations to children who are uninsured or medically underserved. The goal of Care Van is to provide over 25,000 immunizations to 15,000 children in the DFW area during the 2010–2011 school year.

**Child and Family Guidance Center**  
**Dallas—$20,000**  
Funding will support the Intensive Services for Children with Mental Illness program, serving children with severe mental illness or emotional disturbance. CFGC is the second oldest child guidance clinic in the nation and primarily serves low-income families.

**Dallas Fort Worth Hospital Council Education & Research Foundation**  
** Irving—$20,000**  
Funding will be put toward development of a community health website, providing a data-rich information resource used by hospitals, researchers and nonprofits to plan programs and evaluate initiatives. The site will include data on more than 170 selected community health indicators.

**Social Services**

**Bryan’s House**  
**Dallas—$20,000**  
Funding will support the Social Services Support Program, providing case management, counseling, emergency financial assistance and referrals to families of children receiving medically managed child care at Bryan’s House. Children served by the agency have medical and developmental special needs, and almost all of the families are uninsured or underinsured and living in poverty.

**Consumer Credit Counseling Service of Greater Dallas**  
**Dallas—$20,000**  
Funding will be used for financial education and counseling programs for approximately 900 families in partnership with Head Start of Greater Dallas and Campfire USA Dallas. Topics include budgeting, managing credit, surviving job loss, and asset building.

**Jonathan’s Place**  
**Dallas—$20,000**  
Funding will provide operating support for the emergency shelter and foster & adoptive family programs for children who are abused, abandoned and neglected. Jonathan’s Place is the only child welfare agency in Dallas County, providing a continuum of care ranging from emergency shelter to placement with a foster family, and ultimately adoption.

**Metro Dallas Homeless Alliance (MDHA)**  
**Dallas—$20,000**  
Funding will provide operational support for MDHA, which operates The Bridge, Dallas’ homeless assistance center. The Bridge serves more than 1,400 people each day. MDHA is also responsible for implementing the City’s 10-year plan to end chronic homelessness.

**Youth**

**Communities In Schools Dallas Region**  
**Dallas—$20,000**  
Funding will support GirlSafe, a violence prevention and early intervention program for middle and high school girls. Students referred to the program participate in weekly individual and small group sessions that focus on developing healthy relationships and understanding physical, sexual and verbal/emotional abuse.

**Dallas Challenge Inc.**  
**Dallas—$15,000**  
Funding will provide operating support for the organization, which serves youth ages 7–23 with a history or high risk of substance abuse, truancy, fighting and other negative behaviors. Dallas Challenge delivers prevention, intervention and outpatient treatment services to more than 7,800 youth each year.

**Promise House**  
**Dallas—$20,000**  
Funding will provide operating support for the agency, which serves homeless teens. Promise House offers nine programs that include emergency shelter; long-term transitional housing; services for pregnant and parenting teens; individual, group and family counseling; substance abuse prevention and education; and a street outreach program.

**YMCA of Metropolitan Dallas**  
**Dallas—$20,000, Program**  
Funding will support the Y’s Urban Swim initiative, teaching African American and Hispanic youth how to swim and be safe around water. The Y partners with DISD to offer year-round swim lessons to students during the school day, and with the Apartment Association of Greater Dallas to offer summer lessons to youth residing in 16 low-income apartment complexes.