

IMPACT

YOUR PHILANTHROPY MAGAZINE

2018 | VOLUME 2

COMMUNITIES
FOUNDATION of TEXAS



GET UP *and* GIVE!

NORTH TEXAS GIVING DAY PLANS 10 DAYS OF GIVING
FOR 10th ANNUAL EVENT

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A LETTER FROM OUR PRESIDENT

It's been a busy season of giving here in North Texas. While many might typically think of year-end as the season of giving, at Communities Foundation of Texas, giving happens year-round, and we couldn't be more honored to support you. Each day, we see firsthand that where giving and caring thrive, communities thrive too. This latest edition of *IMPACT* is filled with stories of just that, highlighting a variety of ways we're partnering with businesses, nonprofits, educators, professional advisors, individuals and families.

We continue to be amazed at our community's generosity, which was so evident throughout our recent partnership with *D CEO Magazine* to launch the inaugural *Nonprofit and Corporate Citizenship Awards*. In early August, 450 business, community and nonprofit leaders gathered together to honor and uplift the incredible companies and nonprofits working to make lasting positive change in North Texas. The inaugural awards received a record-breaking number of nominations for *D CEO*, 340, which underscored the depth and breadth of North Texas generosity.

On another exciting front, North Texas Giving Day is soon approaching on September 20, and it's a very special 10th anniversary year! We're hoping to continue to break national records. In honor of the 10th anniversary, you'll have 10 days to schedule your gift online at NorthTexasGivingDay.org. We encourage you to join us, along with your families, and give your time too! During our 10 days of scheduled giving, there will be a number of volunteer activities for you to help nonprofit organizations in meaningful ways. There will also be multiple fun rallies along the way.

We hope you'll join us in the giving celebration to help bring people together to give wisely to our North Texas nonprofits. In nine years, together we've raised \$195 million to help meet local needs through this community-wide giving event. What will 2018 bring? We can't wait to find out. With your help, we can make the 10th anniversary one to remember for a lifetime.

With gratitude,

PRESIDENT AND CEO,
COMMUNITIES FOUNDATION OF TEXAS

“Each day, we see firsthand that where giving and caring thrive, communities thrive too.”

Simplifying Complex Giving

Did you know that Communities Foundation of Texas can accept a wide range of gifts, even real estate, art and antiques?

WHILE ASSETS THAT ARE MOST TAX advantageous to give may be complex, your charitable giving doesn't have to be.

Prior to **Peggy and David Rockefeller's** record-breaking art auction this spring, **Communities Foundation of Texas** held an event in partnership with **Christie's** and **Bessemer Trust** that shared the story behind the Rockefeller family's philanthropy and highlighted ways to give complex assets, such as art, to charity.

The Rockefeller collection of 1,500 items brought in \$832.6 million—the highest ever for a private collection at auction. All of the estate's proceeds from what is now the most significant charitable auction in history will be directed to charity. In a statement, **David Rockefeller, Jr.** said: "The auction exceeded our expectations in so many ways. Christie's and our family had a shared financial goal of raising more than \$500 million in estate proceeds for the 12 philanthropies our parents cared about so deeply,

and it has been both humbling and deeply gratifying to see a sale total that reaches so far beyond that. These funds will provide very meaningful support to important institutions and foundations devoted to scientific research and higher education, support for the arts, foreign policy, and the conservation of coastal and agricultural lands."

"We love helping people think creatively to find ways to give that make the most sense for them with the resources and assets they have. We have the expertise to find the right way to make these work for each individual, family or business."

**CAROLYN NEWHAM, SENIOR DIRECTOR
OF DONOR RELATIONS AT CFT**

The following are a few examples of complex gifts Communities Foundation of Texas has accepted:

Real Estate to Real Impact

A local CPA recommended that his client partner with CFT when the client was looking into how a property here in Dallas could help fund their philanthropy.

Working with the client, CFT was able to accept and place a percentage of the business into a donor-advised fund where it will produce income that can be used for grantmaking to nonprofits. In the event that the business is sold, that sale will further add to their charitable impact and legacy. CFT works with each scenario to provide the best outcome for the client and the advisor in order to maximize the client's tax benefits while fueling the client's philanthropy.



Panelists Carolyn Newham of CFT, Scott Deke of Bessemer Trust, Bonnie Brennan of Christie's, and Monica Egert Smith of CFT spoke about complex giving at CFT in April.



“We enjoyed the paintings for many years, and for the past few years we’ve been able to experience more joy by using their value to help others.”

LINDA BUFORD

The Art of Giving

Longtime friends of CFT, **Linda Buford** and her late husband **Bob Buford** were stunned when two contemporary paintings they owned were appraised at 50 times what they had paid for the paintings when originally purchased in 1981.



With the new appraisal, the Bufords began to think of the paintings more as an investment that had appreciated than as beautiful artwork, and they worried

about how light and humidity might affect their value. They decided to gift the paintings to Linda’s donor-advised fund at CFT so that CFT could sell the art at auction and Linda could recommend more grants to their favorite charitable causes.

The Bufords donated the paintings to CFT, and CFT handled the details necessary for selling the paintings at a fall contemporary art auction in New York, which Bob and Linda attended. CFT negotiated details of the consignment agreement, insured the paintings and arranged for them to be transported to New York in order to be photographed for the auction catalog.

“We enjoyed the paintings for many years, and for the past few years we’ve been able to experience more joy by using their value to help others,” said Linda.

New Uses for Antiques

Have you ever thought about what will happen to your favorite possessions beyond your lifetime? What about gifting those of high value to charity? Creating provisions in your estate can be an impactful way to further your philanthropic passions long beyond your lifetime, and CFT can often be the perfect partner to facilitate this on your behalf.

One of CFT’s donors has been a longtime collector. She has a collection of antiques that are very meaningful to her and wants to keep these items that bring her joy with her during her life. But beyond her lifetime, she will use these cherished assets to create her charitable legacy.

For her, that means supporting her favorite animal causes. She has created a provision in her estate plan stipulating that proceeds from the sale of her collection will support animals in need for years to come through a named fund at CFT. CFT is honored to support her passions on her behalf long into the future.



Learn more at www.cftexas.org/assets or contact **Geri Jacobs**, Director of Charitable Gift Planning, at gjacobs@cftexas.org or 214-750-4226. 

THE SPARK THAT INSPIRES

Educate Texas hosts largest-ever annual leadership summit



ON JUNE 26–27, with the theme “The spark that inspires,” Arlington Convention Center was transformed into a hub of learning for more than 650 school leaders representing more than 300 schools from across the state who attended Educate Texas’ **2018 College and Career Readiness School Models (CCR School Models) Leadership Summit**. Educate Texas serves as the technical assistance provider for the **Texas Education Agency (TEA) CCR School Models** network, which includes the educational models of Early College High Schools; Texas Science, Technology, Engineering and Math Academies; Industry Cluster Innovative Academies; and Pathways in Technology Early College High Schools.

Attendees heard from keynote speaker **Brittany Wagner**, star of the Netflix show “Last Chance U” and founder of **10 Thousand Pencils**, an organization which helps counselors throughout the country advise students to believe in themselves academically. Breakout sessions included topics such as “Tapping Into Local Workforce Resources,” “Keeping the End Game in Mind – Supporting

Students Beyond High School” and “Using Workforce Data to Design Your Campus.” Educate Texas’ Executive Director **John Fitzpatrick** shared remarks with attendees about their work’s cumulative impact on our state’s students, economy and future workforce. The day concluded with an inspirational presentation from author and speaker **Stephanie Hirsh**, executive director of **Learning Forward**.

Attendees also learned about real-world workforce needs and opportunities through site visits to partner companies. Tour sites included: **Airbus**, **American Airlines**, **AT&T**, **Atmos Energy**, **Bank of America**, **Capital One**, **Children’s Health**, **Hill & Wilkinson**, **J.P. Morgan**, **Texas Instruments**, **Texas Scottish Rite Hospital for Children**, and **US Trust/Bank of America**.



Keynote speaker Brittany Wagner, founder of 10 Thousand Pencils

The CCR School Models network, led by the TEA and supported by Educate Texas, provides educators the resources they need to help historically underserved students develop technical skills, earn dual college credit and pursue in-demand career paths. Learn more about this event at edtx.org/2018ccrsummit or to learn more about partnership opportunities and ways to engage with campuses, please contact edtxdevelopment@cftexas.org.

EDUCATE TEXAS SUPPORTS STEM FOR ALL

Texas Instruments Foundation grants \$4.6 million for Richardson ISD initiative

“STEM FOR ALL” is the new motto being celebrated in **Richardson ISD**. In May 2018, the **Texas Instruments (TI) Foundation** announced a \$4.6 million grant to Educate Texas to support Richardson ISD in creating a science, technology, engineering and math (STEM) feeder pattern within the **Lloyd V. Berkner High School** attendance zone.

With technical assistance provided by Educate Texas, this initiative supports 16 schools serving more than 10,000 students from 80 different countries. The intent of this “STEM for All” concept is to reshape the teaching and learning of these subjects across all grade levels to better prepare students for higher education and workforce success.

As part of its Texas-STEM (T-STEM) designation by the **Texas Education Agency**, Berkner High School currently offers three STEM career strands for students: engineering robotics, aeronautical engineering, and biotechnology. In the 2018–2019 school year, the school will introduce two new strands: cybersecurity and STEM management.



STEM for All announcement at Lloyd V. Berkner High School on May 16

This effort builds upon prior grants from the TI Foundation to Educate Texas which supported a district-wide STEM model in **Lancaster ISD** from 2012–2018, during which Educate Texas was also the technical assistance provider. This strategy has resulted in the improved performance of students across the district, particularly African-American students, who outperformed their peers across the state in math. Because of the success of the Lancaster ISD STEM district, the TI Foundation and Educate Texas worked together again to assess candidates from other North Texas districts to extend the concept, resulting in Richardson ISD being selected after a competitive selection process. Learn more at edtx.org/RISDSTEMforall. 

WHERE GIVING EMPOWERS

Educate Texas
2017 Annual Report

To view the report, visit:
www.edtx.org/annualreport



Educate Texas is excited to announce that our 2017 annual report, *Where Giving Empowers*, is here. Visit edtx.org to view the report and read about our progress toward our 20x2020 Student Success Plan to ensure that all Texas students are prepared to succeed in school, work and life. Our goal is to make a positive impact on 20 percent of the nearly 7 million public school and higher education students and the 350,000 public education teachers in Texas by 2020. With the generous support of everyone involved with Educate Texas, we are working tirelessly to reach a tipping point of realizing our vision for a 21st-century Texas where every student has a clear path and equal opportunity to succeed. To join these efforts, please contact edtxdevelopment@cftexas.org.

BIOWORLD PARTNERS With CFT FOR BUSINESS

WITH MORE THAN 350 EMPLOYEES in the U.S., **Bioworld** has partnered with CFT for Business (CFT4B) to increase employee engagement through volunteerism and charitable giving since 2015. Headquartered in Irving, Bioworld designs licensed apparel, sleepwear, headwear, bags and accessories. Bioworld has offices in New York; Bentonville, AK; Minneapolis, MN; and Athens, GA; as well as international offices in Canada, China, India and the UK.

“Bioworld CEO **Raj Malik** inspires employees to volunteer their time in the community and incentivizes employee giving through a matching gifts program,” noted colleague **Shelly Reid**. CFT4B works with Bioworld to strategically align their business and community goals and assists in coordinating volunteerism opportunities for employees through the **CFT4B Engagement Network**. “Quarterly, our ‘ThinkHow’ committee of employees reviews a list of volunteer opportunities from CFT and determines which volunteer activities to promote internally,” noted colleague **Dawn Hicks**.

Recently, Bioworld hosted a competition between departments and offered a prize for the department that raised the most money for **Foster Kids Charity**. As an added incentive, Malik matched all gifts raised by each department.

“Collectively, we raised \$4,800 to purchase tablets, iPads and laptops for foster kids in need,” said Reid. Employees presented the check to Foster Kids Charity in person. “We’ve collected school supplies and other things in the past, but this was our best fundraiser by far in terms of employee participation. Staff knew that their gifts would go further because of the dollar-for-dollar match,” said Reid.

Bioworld plans to partner with Foster Kids Charity to provide the organization with an additional donation in support of CFT’s Freedom Day, an event they’ve participated in for a number of years.

“We have a charitable giving budget as a company, and partnering with CFT for Business helps us to focus those dollars and really make a difference,” said Hicks. 



Welcome to CFT’s newest Business Engagement Network Members:

BeautyKind	Texadia Systems
CoVerica	Texas Health Resources
Cowles & Thompson	TruePoint Communications
Federal Reserve Bank of Dallas	UTD School of Engineering
Hunt Consolidated	<i>View the full list of engagement network members at www.cft4b.org</i>
The Plexus Groupe	
Preston Hollow Capital	

CFT Business-Advised Funds:

Amarr Garage Doors	Independent Insurance Agents of Dallas
Asava Consulting	Marketwave
Austin Industries Inc.	Neiman Marcus
Beyond Profit Impact Fund	NETSCOUT
Brennan Financial Services	NorthPark Center
Collide Village	Rasa Floors
CoVerica	Republic Companies, Inc.
DHD Films	Rethink Results
Friends of the Aga Khan Foundation	Texadia Systems
HALL Group	Triune
Hill & Wilkinson	Vent-A-Hood Fund
HumCap	WFAA

To learn more about how your company can partner with CFT4B to give back and/or to learn more about our upcoming September Freedom Day events, contact **Sejal Desai**, Business Engagement Director, at sdesai@cftexas.org or **Vickie Yakunin**, Business Relations Director, at vyakunin@cftexas.org.

NORMAN BRINKER SCHOLARSHIP AT CFT

Legendary restaurateur's legacy of excellence continues to inspire

NORMAN BRINKER'S INTEGRITY, entrepreneurship and competitive spirit made him a legend, but it was his generosity and the desire to help raise the skill of others that made him beloved by his family, peers, employees, and the countless lives he touched.



Norman Brinker entrusted CFT with his charitable legacy.

The quintessential entrepreneur and founder of **Brinker International**, **Norman Brinker** created, acquired and grew many of today's most beloved restaurant chains. His impact on the culinary world can be felt by everyone from customers to the thousands of people he

inspired to believe in themselves, their ideas and the highest standards possible—principles he practiced throughout his life.

While Norman founded and funded numerous nonprofits during his lifetime, he had a special relationship with CFT. For more than 30 years, CFT had the privilege, honor and pleasure to work with him. He served on CFT's Advisory Council and supported many charitable organizations including **The Chiapas Project**, **SMU**, **Dallas Museum of Art**, and **The Salvation Army**.

After Norman's death, his daughters **Brenda Brinker Bottum** and **Cindy Brinker Simmons** have continued to work with CFT to further the charitable work their father started and continued with CFT through his estate plans. In order to connect their father's career with his desire to give back, Cindy and Brenda established the **Norman E. Brinker Family Scholarship** that will support students pursuing a degree at the **University of Houston's** renowned **Conrad Hilton College of Hotel and Restaurant Management**.

While both Brenda and Cindy are active philanthropists on their own, they turned to CFT to help establish and manage this scholarship, ensuring that their father's legacy of excellence continues to influence the next generation of restaurateurs.



Cindy Brinker Simmons and Brenda Brinker Bottum continue their father's legacy.

To learn more about creating a giving legacy, contact **Melissa Hardage**, Donor Initiatives Officer, at mhardage@cftexas.org. 

“Oh, what one person can do to create a better world! Passing on a legacy of giving to the next generation is such a blessing!”

CINDY BRINKER SIMMONS

Place Matters

CFT's new report reveals racial divides across Dallas County

DALLAS COUNTY IS GROWING and changing and our rapidly expanding population is one of our greatest assets, providing a relatively young and diverse workforce that can drive economic growth in Dallas for years to come. While Dallas County, and North Texas as a region, has many resources, we also face obstacles that limit the upward mobility for many of our residents.

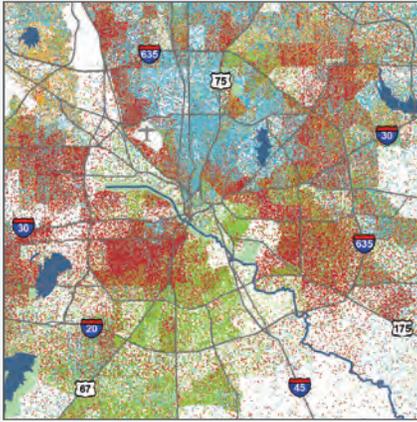
A new study released by **Communities Foundation of Texas** shows that there are clear connections between racial segregation, educational attainment, access to credit and household income in Dallas County. CFT commissioned the Dallas Economic Opportunity Assessment, a comprehensive analysis of the county's economic opportunity, from the **Center for Public**

Policy Priorities (CPPP). The Assessment seeks to illustrate the challenges and define the underlying factors that threaten economic prosperity in the Dallas area. Not only does financial insecurity destabilize families, it also jeopardizes the long-term vitality of cities and local economies. Now is the time to empower people and programs across our community.

The report dives deeper into five indicators of economic opportunity: 1) income/employment, 2) educational attainment, 3) debt and assets, 4) health, and 5) public safety. The combination of these five areas provides a multifaceted snapshot of the opportunities and challenges facing people of color across Dallas and the surrounding region.



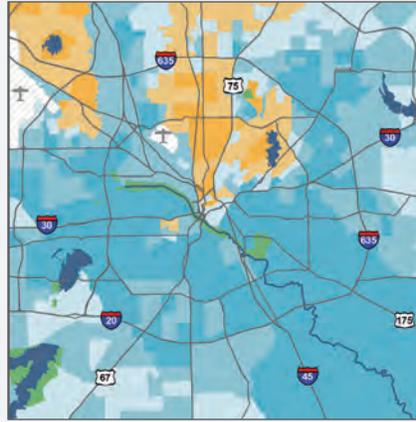
Dallas County Is Segregated by Race



1 DOT = 10 PERSONS

- BLACK
- HISPANIC
- WHITE
- OTHER

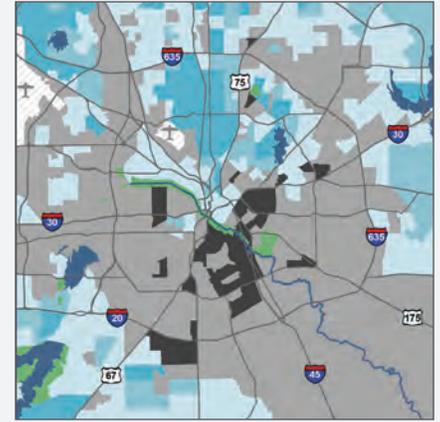
Education Differs by Place



PERCENTAGE OF ADULTS AGES 25+ WITH AN ASSOCIATE DEGREE OR HIGHER LEVEL OF EDUCATION

- Less than 20%
- 20% to 39.9%
- 40% to 59.9%
- 60% to 79.9%
- 80% or more

Lower Incomes for People of Color



MEDIAN HOUSEHOLD INCOME

- Less than \$25,000
- \$25,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,000
- \$100,000 or more

We have work to do

As seen above, Dallas County has high levels of geographic segregation by race/ethnicity, income, educational attainment and wealth. What this means for low- to moderate-income Dallas residents—and for people of color, who are disproportionately represented in that category—is that where they live profoundly influences their access to opportunity. Because access to quality schools, health care, good paying jobs and safe neighborhoods are increasingly interrelated, it is more and more difficult for people to overcome barriers to opportunity on their own.

“Success for our city will only be attained when all people have a path to success. This study helps us examine some of the key issues that our citizens are facing. We are tackling them head on and looking for new, innovative ways to make better progress faster.”

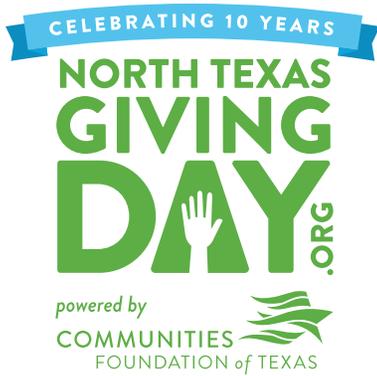
DALLAS MAYOR MIKE RAWLINGS

People of color are Dallas’ present and future

People of color are integral to the current and future economic stability and prosperity of Dallas. By 2050, 88 percent of Dallas County’s projected 3.3 million residents will be people of color, and children of color already represent 83 percent of all young people in Dallas County. But people of color face persistent barriers to economic opportunity in Dallas with big disparities in education, employment, income, health outcomes and opportunities. Given that Dallas’ population growth is being driven by people of color, their opportunities for economic security will directly impact economic security for the region and for the future of Dallas County.

To view the full report, visit www.cftexas.org/dallas-economic-opportunity-assessment. 

SOURCE FOR STATISTICS: *United States Census Bureau, 2010 Census and 2015 American Community Survey*



Let's get this giving party started!

Join us to make the 10th annual event the best ever

NOW THE LARGEST ONLINE GIVING EVENT IN THE NATION, North Texas Giving Day has supported and empowered more than 3,800 nonprofits to raise \$195 million dollars and move their missions forward. This online event has been transformative for nonprofits and donors alike, igniting a movement of giving and changing the face of philanthropy with the clarion call to get up and give!

This year, North Texas Giving Day is September 20, 2018, and CFT is rallying people to again give locally and wisely to North Texas organizations. With fun new features, giving on North Texas Giving Day is easier than it's ever been. Donors can schedule their gifts beginning September 10, and can support multiple organizations with even better mobile functionality—and a new app! 📱



Team CFT hosted 800 nonprofit leaders at the North Texas Giving Day nonprofit kickoff at the Moody Performance Hall in June.



Using the #WhyIGive frame is a fun way for super fans to share photos and stories about why they will get up and give on September 20.

HELP MAKE WISHES COME TRUE

for local nonprofits on #NTxGivingDay!

“Our goal was to raise \$50,000 to complete our Activity Room for special needs adults. At midnight on North Texas Giving Day we had raised \$45,000. We were SO thrilled to receive a call the following morning announcing that **we had won first-place prize in our category for the organization with the largest increase in number of donors.** Now we are able to complete the room which will give our adults room to have additional classes, socials, dances and an indoor sports area.”

—SOARING EAGLE CENTER

“Through North Texas Giving Day, **Pamper Lake Highlands** was able to secure five times the amount of donations that were acquired in 2016. **North Texas Giving Day has been the catalyst for providing more critical programming** which helps break the cycle of generational poverty and oppression for local women and children, as well as provide pivotal branding opportunities.”

—PAMPER LAKE HIGHLANDS

“**We were able to raise enough money to extend our program to help single mothers displaced by Hurricane Harvey!** We have started house renovations and will be able to move some women in soon to help them rebuild a sustaining life.”

—AGAPE RESOURCES & ASSISTANCE CENTER

“This was our first year to have a matching fund. We were nervous because this required a HUGE increase in what we normally raised. **We went from about 35 donors to about 55 donors, and met our goal exactly.** Most of our donors gave, and we added many new ones. I know this matching fund is what made more people give!”

—PROJECT ACCESS TARRANT COUNTY

“**We met our goal of raising \$3 for every neighbor we will serve in 2017,** nearly \$90,000, and we exceeded our goal and hit over \$100,000.”

—CITY SQUARE

Give online at NorthTexasGivingDay.org!



NEW FUND HOLDER LUNCHEON



Geri Jacobs and Ami Doshi visit with Clare and Cal Chaney before the luncheon.



Kathryn McGill, Seema Deshpande, Sejal Desai

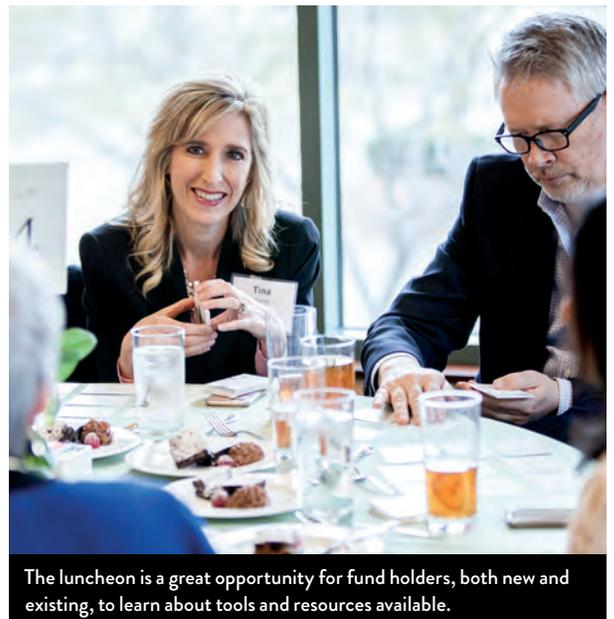
In January, CFT hosted our annual welcome luncheon for our newest fund holders. During lunch, they met other donors as well as some of the CFT staff. New donors then learned how to make the most of their charitable funds, the history of CFT and some of the different services now at their disposal.



More than 20 attendees enjoyed getting to know each other over lunch.



Vickie Yakunin, Sarah Beeks Higdon, Andy Smith, Paul Von Wupperfeld



The luncheon is a great opportunity for fund holders, both new and existing, to learn about tools and resources available.

CAUSE-MINDED CONVERSATION AT TOYOTA



CFT is grateful for the support of the host committee in making this event such a success.



Laura Curran, Robin Joseph-Williams, Janet Butler

In June, Communities Foundation of Texas and our Educate Texas initiative co-hosted “Cause-Minded Conversation: Putting STEM to Work,” a special panel discussion with the Toyota USA Foundation at the Toyota North America headquarters to bring more attention to STEM needs locally.

The importance of STEM education goes beyond helping students reach their potential—it’s a means for regions to strengthen their economies. By 2030, 60 percent of Texans ages 25 to 34 years old will need a postsecondary credential to be gainfully employed.



It takes the collective efforts of business, philanthropy, educators and citizens working together to make a lasting difference.



CFT staff members welcomed young philanthropists Jonah Fahrenbruch and Christian Karlseng to CFT and answered questions about how their donation would be used.

PHILANTHROPISTS COME IN ALL AGES

Young philanthropist Jonah Fahrenbruch led his 3rd grade class at Alcuin School to hand-squeeze, market and sell lemonade to raise money to support kids on the Gulf Coast impacted by Hurricane Harvey. After raising \$1,100, the class was looking for a place to donate the money where it would have the greatest impact. Jonah’s mom saw a story about our Harvey KIDS Fund featured in the spring CFT newsletter and reached out to CFT to make the donation. When the boys visited our office, she surprised them by matching their donation with an additional \$1,100 to bring their total gift to \$2,200.

“BRAINIIOUS” SCREENING



Educators, nonprofit professionals and community leaders gathered for the screening.

In April, Communities Foundation of Texas partnered with Momentous Institute to present a screening of the documentary “Brainious,” a film that shares useful neuro-knowledge for parents and educators in order to help children thrive and reach their full potential. After the film, there was a discussion with Michelle Kinder, executive director of Momentous Institute; Sarah Cotton Nelson, chief philanthropy officer of Communities Foundation of Texas; and Stéphanie Brillant, the producer of “Brainious.”



Susan and Evan Owen, Isabel Arista, Celeste Arista Glover and Charles Glover



Catherine LeBlanc and Sandy Nobles



“Brainious” touched on attachment and the way the brain learns.

ANNUAL PROFESSIONAL SEMINAR

In May, CFT and SMU hosted wealth advisors, attorneys and accountants at the annual professional seminar. Christopher Hoyt, law professor at the University of Missouri-Kansas City School of Law, spoke on multiple topics of note, including retirement assets for first and second marriages, income tax savings with charitable bequests and the ins and outs of choosing between private foundations, supporting organizations and donor-advised funds.



Professor Christopher Hoyt spoke to a room full of lawyers, accountants and other professional advisors from all over North Texas.



Colleen Sims, Marion Armstrong, Randy Dixon



Professor Hoyt’s engaging presentation provided professional advisors with tips and tools for assisting philanthropists.



Speaker Chris Hoyt, Sarah Beeks Higdon, Marianne Piepenburg, Kathryn McGill, David Scullin, Carolyn Newham, Brad Cheves, Monica Egert Smith

REMEMBERING RUTH



Sally Harris, daughter of Ruth Sharp Altshuler, spoke about her mother's legacy of community involvement.



The evening was focused on Ruth but transcended even her, capturing the essence of our mission to improve our community.

CFT's annual Chairman's Dinner honoring current and former trustees and their spouses was held in March. The evening was dedicated to memories of Ruth Sharp Altshuler and all the contributions she made to our community through more than 30 years of service as a CFT trustee. It was a spectacular evening, touching the hearts of everyone in attendance.

Following the dinner and remarks, guests adjourned to the east wing and toasted Ruth in the CFT library that was redecorated and renamed "The Ruth Collins Sharp Altshuler Library." As a trustee, Ruth was part of many pivotal decisions at CFT, and the renamed library ensures that her history with our organization will always be remembered.



Nadine Dechausay, Connie O'Neill, Sarah Cotton Nelson



Monica Egert Smith, Sally Harris, Stanton Sharp



The sentiment of guests, family members and staff is that Ruth's spirit was absolutely captured in the newly renamed library.

SMART JUSTICE

Of Texas inmates, 34 percent have a mental health need, and most have substance use disorders. The state of Texas spends hundreds of millions of dollars annually to provide mental health services to these individuals. Dallas is piloting a better way.

SEVENTEEN THOUSAND PEOPLE with mental illness are booked into the Dallas County Jail every year and, according to a study by the **Meadows Mental Health Policy Institute (MMHPI)**, 40 percent return within a year of their release. Their study also found that 85 percent of 911 calls in certain parts of Dallas were directly related to mental health emergencies and that more than half of people with serious mental illness in the Dallas County Jail had been incarcerated for minor offenses, often because of a lack of access to adequate mental health treatment.

This revolving door of temporary fixes not only burdens Dallas first responders, but the entire justice system. In 2013, Dallas County spent over \$47 million on housing, booking and treatment for people with mental illness. And with the number of mental health calls increasing year over year, that amount has continued to rise.

With the support of the **W.W. Caruth, Jr. Foundation Fund** at **Communities Foundation of Texas**, the MMHPI has engaged partners and stakeholders across Dallas County in a comprehensive planning process to identify and develop community-wide consensus on the strategies needed to improve public safety by diverting people with mental illness away from the Dallas County justice system and into the care they need.

The primary objective of the project is to improve public safety by reducing the burden on Dallas law enforcement and the Dallas County Jail of having to respond to people who come into contact with the system for severe psychiatric needs but who are not a compelling public safety risk.

As **Dallas Police Department (DPD) Assistant Chief Paul Stokes** told **Fox 4 News**, “A lot of times when we dispatch an ambulance to deal with mental health calls, those aren’t quick and easy calls to resolve. We may have to be on scene for some time.”

Responders often haven’t been specially trained to deal with mental health emergencies. But, the City of Dallas has recently launched a program to help solve this issue.



Many mental health patients should be admitted to the hospital, not to jail.

The pilot program, called the **Rapid Integrated Group Healthcare Team Care** (or **RIGHT Care** for short), is a collaboration between **Parkland Health & Hospital System**, **MMHPI**, **DPD** and the **Dallas Fire-Rescue Department**. When a mental health 911 call is placed, a **RIGHT Care** response team will be dispatched to evaluate the situation.

This team of professionals will consist of a trained police officer, a trained paramedic and a behavioral health specialist from Parkland Hospital. Additionally, a Parkland mental health clinician also will be stationed in the 911 call center to monitor calls and assist Dallas officers citywide.

Celeste Johnson, Parkland's vice president of nursing services, behavioral health, said the program has already shown positive results. During the beta testing phase, the number of patients in emergency room care for mental health problems was reduced. Instead, the majority of clients were taken to outpatient health centers to get the help they needed.

Together, these organizations are working to ensure that individuals with mental health needs get treatment rather than enter the justice system, thus empowering people with mental illness to have greater opportunity to live productive lives in our community.

“Undiagnosed mental illness can lead sufferers down a dangerous path to criminal activity. Convenient access to mental health professionals can help those at risk avoid our jails.”

—TEXAS STATE OF MIND

To learn more, visit www.texasstateofmind.org/focus/smart-justice. 



50% of prison and jail inmates in the United States have been diagnosed with a behavioral disorder.*



Individuals with untreated mental health and substance use disorders are 8 times more likely to be incarcerated, often due to lack of access to appropriate crisis services and ongoing care.



17% of adults entering jails and state prisons have a serious mental health illness.**



34% of Texas inmates have a mental health need and most have substance use disorders.***

*U.S. Department of Justice, Office of Justice Programs

**Council of State Governments Justice Center

***Texas Department of Criminal Justice



Key community partnerships can raise awareness of mental health issues and extend help to those who need it.



2.5 million jobs requiring science, technology, engineering and math (STEM) credentials are predicted to go unfilled this year alone.

IN JUNE, COMMUNITIES FOUNDATION OF TEXAS and our Educate Texas initiative co-hosted “Cause-Minded Conversation: Putting STEM to Work,” a special panel discussion with the **Toyota USA Foundation** at the **Toyota North America** headquarters, to bring more attention to STEM needs locally. Like CFT, Toyota USA Foundation has a long history of supporting STEM education efforts.

PANELISTS INCLUDED:

- **Andres Alcantar**, Chairman, **Texas Workforce Commission**
- **Michael Medalla**, Manager, **Toyota USA Foundation**
- **Dr. Neil Matkin**, President, **Collin College**
- **Alfreda Norman**, Senior Vice President, **Federal Reserve Bank of Dallas**
- **Monica Egert Smith**, Chief Relationship Officer, **Communities Foundation of Texas**
- **George Tang**, Managing Director, **Educate Texas**

The importance of STEM education goes beyond helping students reach their potential—it’s a means for regions to strengthen their economies. **U.S. Department of Labor** employment projections over the next decade indicate that of the 20 fastest-growing occupations, 15 of them require significant mathematics or science preparation.

Dave Scullin, CFT president and CEO, noted that it is in businesses’ best interest to support STEM education initiatives like those in place at Educate Texas, an innovative public-private partnership established by CFT. The organization and its partners all share a common goal: improving the public education system so that every Texas student is prepared for success in school, in the workforce, and in life. Further inspired by the state’s recognition that 60 percent of Texans ages 25 to 34 years old will need a postsecondary credential to be gainfully employed by 2030, Educate Texas’ work is even more urgent.

George Tang, managing director for Educate Texas, shared that, “STEM is about how individual students work independently and with others, analyze information, synthesize it into coherent thoughts, and then distill it into something meaningful that they can take action on. STEM is no longer just about science, technology, engineering and math—what it should really stand for is ‘Successful in Today’s Evolving Marketplace’—because that’s what it has evolved into here in Texas and across the country.”

Throughout the panel, both alarming and hopeful data points were shared regarding local education.

The Alarming

Out of our state's 5.5 million public education students, 60 percent are economically disadvantaged. These students often lack exposure to STEM and an understanding of its relevance to their current paths and future careers. Educate Texas and partners are looking to counteract that by starting STEM exposure and immersion much earlier, in elementary and middle school.

The panel stressed the importance of providing support for students from cradle to career. **Michael Medalla** of the Toyota USA Foundation encouraged more comprehensive partnerships across sectors, highlighting how the Toyota USA Foundation has provided capacity building and expertise in addition to philanthropic dollars.

Attention was also drawn to the imperativeness of providing wraparound services and a 360-degree approach to levers that affect successful educational outcomes, such as access to transportation, affordable housing, healthcare and childcare. "If we tackle these issues together, we can truly make a difference for our students, our families and our community," said Medalla.

Andres Alcantar agreed that partnership is key and encouraged those interested in helping to provide students with early opportunities for mentoring and career guidance. "When students work with company employees and mentors, they begin to see and believe what's possible for them and think about building their own career pathway."

The Hopeful

Tang shared some major recent STEM successes, particularly for low-income, first-generation students who are achieving postsecondary enrollment and degree attainment. In 2012, Educate Texas partnered with **Texas Instruments** to pilot the nation's first district-wide STEM initiative in **Lancaster ISD**, a district in Southern Dallas County of 7,500 students where nearly 90 percent of the student population is economically disadvantaged.

Over the past six years, TI and Educate Texas' investment of \$7 million has transformed the district. Growth in math

scores outpaced state growth for peer populations by 12 percent. In the most recent academic year, 8th grade math improved by 26 percent—four times the growth in the state and far outpacing other Dallas County schools. Additionally impressive, families are moving back into Lancaster and the student population has grown two times more than other Dallas area districts. TI and Educate Texas recently announced a new \$4.6 million investment in **Richardson ISD**.

The panel also encouraged advocacy supporting STEM. "We need to keep pace with innovation in the workplace. We need to support policies that accelerate models that work for employers to offer applied learning opportunities and credentials, especially in our rural and urban areas, as it will pay huge dividends for our students," said Alcantar.

It takes the collective efforts of businesses, philanthropists, educators and concerned citizens to make a lasting difference. As **Al Smith**, group vice president, social innovation at Toyota Motor North America, said in his opening remarks, "We are better when we are working together to achieve change. Our challenge is to create a sustainable, positive future for our students, teachers and communities." Will you join us?



Panelists discussed the merits of STEM education.

"STEM is no longer just about science, technology, engineering and math—what it should really stand for is 'Successful in Today's Evolving Marketplace.'"

GEORGE TANG

To view the live stream from this event, to read additional media coverage or view event photos, visit www.cftexas.org/putting-stem-to-work. 

Be Savvy With Bunching Donations and Income-Based Charitable Bequests

Chris Hoyt gives tax advice at the annual CFT Professional Seminar

THE PROFESSIONAL SEMINAR is an annual continuing education event for professional advisors hosted by **Communities Foundation of Texas** and **Southern Methodist University**. In May, **Chris Hoyt**, professor of law at the **University of Missouri-Kansas City School of Law**, addressed the strategies and solutions for retirement asset planning for first and second marriages, income tax savings with charitable bequests and the cost-benefit choices for philanthropists when choosing ways to make donations to a private foundation, a supporting organization or a donor-advised fund.

Discussing ways that estate planning techniques could benefit donors, Professor Hoyt offered the following advice:

Income-Based Bequests

Discussing ways that estate planning techniques could benefit donors, Professor Hoyt advised the room that there are different ways to consider making a charitable bequest through an estate. The more traditional approach is a direct gift from the assets of the estate, which can reduce the estate tax. He encouraged the practitioners in the room to also consider having the charitable bequest be made from the estate's taxable income, not just the assets, which provides income tax savings. This is a very different approach but one that can be very advantageous for the right donor.

Bunching Donations to Your Donor-Advised Fund

Savvy fund holders may plan to make a larger gift or "bunch" several years of donations to their CFT donor-advised fund in one year, and maximize their itemized tax deduction. Because there are no grant requirements for donor-advised funds, they can then have their CFT fund make grants to the charities they recommend in this year and over the course of several years.

"Furthermore", says **Jerri Hammer**, CFT Advisory Council member and **Armanino LLP** tax partner, "this technique becomes even more tax-efficient if they are able to fund their gift to the donor-advised fund using long-term appreciated marketable securities, because they will be able to avoid paying the capital gains tax on the appreciation on those securities in addition to enjoying a full fair market value deduction for the gift (perhaps subject to income limitations)."

To learn more or to request a confidential giving consultation, contact **Carolyn Newham** at **214-750-4226** or **cnewham@cftexas.org**. 

ADVISOR TESTIMONIALS



"There are so many reasons I love working with CFT. It seems like almost every day I discover another

client or acquaintance with some connection to CFT. CFT has made them better philanthropists, nonprofits or advisors."

JERRI L. HAMMER, ARMANINO LLP



"CFT has been a wonderful planning partner for me and an exceptional charitable outlet

for my clients who have charitable interests. The CFT staff is both professionally knowledgeable and 'user friendly.' They have assisted me in implementing tax-advantageous structures while simultaneously helping my client families that are working to refine and define their philanthropic goals."

NORMAN A. LOFGREN,
GRAY REED & MCGRAW, PC

NEWS, AWARDS and ACCOLADES



Monica Egert Smith, Chief Relationship Officer, was selected as one of the 2018 *Dallas Business Journal's* 30 Women in Business Awards honorees.



Congratulations to **Elizabeth Liser**, Donor Services Director, and **Ami Doshi**, Donor Initiatives Officer, on earning CAP (Chartered Advisor in Philanthropy) certifications! *CAP holders are members of a nationwide network of planners who can help provide insight for both short- and long-term philanthropic planning.*



United Way of Metropolitan Dallas recently honored the **Mass Care Taskforce (MCTF)** with their 2018 Public Service Award

at their annual United Way awards event. The MCTF is a collaboration between the **American Red Cross North Texas Region, The Salvation Army DFW Metroplex Command, the North Texas Food Bank and VolunteerNow.** A \$5 million challenge grant from the W.W. Caruth, Jr. Foundation Fund at CFT provided initial support for the MCTF.



One of CFT's and Educate Texas' collective impact initiatives, **RGV FOCUS**, was recently awarded the "Talent Hub" designation by the **Lumina Foundation** and the **Kresge Foundation** on behalf of the RGV region. **RGV FOCUS** will receive \$275,000 in grant funding through the designation.

RECENT STAFF PROMOTIONS



Wende Burton has been promoted to Senior Director of Philanthropy.

Beverly Garner has been promoted to Senior Director of Property & Facilities.



Kristen Kuhne has been promoted to Senior Director of Educate Texas.

Dr. Reo Pruiett has been promoted to Senior Director of Educate Texas.



Sarah Beeks Higdon has been promoted to Director of Charitable Giving, Collin County. Sarah was also recently appointed to the Community Advisory Panel of the Junior League of Collin County.

Join us to GROW THE FUND FOR COLLIN COUNTY

CFT is looking for committed, community-minded, forward-thinking businesses and individuals to help grow our recent \$500,000 investment in Collin County to over \$1 million. This fund will help ensure that local needs will be met for generations to come. Providing support for our most vulnerable citizens is critical to maintaining the current and future health and vibrancy of this place that we call home. There are a variety of ways you can give to the Fund for Collin County, such as cash, stocks, bonds, mutual funds, retirement plans, life insurance, IRA distributions and more. Contact **Sarah Beeks Higdon** at 214-750-4247 or shigdon@cftexas.org or learn more at www.cftexas.org/CollinCountyFund. 

We gratefully acknowledge the leadership and support of the generous contributors who have already joined us in this important investment in Collin County:

INITIAL FUNDERS INCLUDE:

Michael J. Adamczyk	Carolyn and Denton Newham
Hong and Jim Bass	Tracy and Brian Rinehart
Deborah and Scott Boxer	Judy and Sam Roach
Capital One	Susan and Dave Scullin
Diane and Dick Evans	Florence and Howard Shapiro
Sarah Beeks Higdon	Cathy and Scott Sweet
Maus Family Charitable Fund	

UPCOMING EVENTS



SEPT. 11 & 15

FREEDOM DAY

Join us for powerful days of community service honoring the lives tragically lost and changed on September 11, 2001. More than 1,000 volunteers will participate in the 17th annual volunteer event, which will focus on projects that benefit and engage the veteran community.



SEPT. 16

NORTH TEXAS GIVING DAY EVENT AT NORTHPARK

Come spend the day at NorthPark and meet some incredible nonprofits from across North Texas. All ages can participate in interactive activities, watch live performances and help make a stronger and more vibrant community for all.



SEPT. 20

NORTH TEXAS GIVING DAY

During North Texas Giving Day, everyone has the opportunity to be a philanthropist online from 6am to midnight. Join us for an 18-hour giving extravaganza to benefit our local nonprofits and make a difference here at home.



OCT. 30

FACES OF GIVING: Diversity in Philanthropy

Learn about the research by The Vaid Group and the nonprofit Faces of Giving on the philanthropic priorities of high net worth donors of color. They will share their findings from interviews with donors of color and leaders of existing donor networks across the country.



NOV. 13

FUND HOLDER DINNER

The CFT Fund Holder Appreciation Dinner is the most wonderful event of the year! Join us this year to hear special guest, adjunct Harvard lecturer James Kane. This is a special event exclusively for CFT fund holders.



DEC. 8

FAMILY SERVICE DAY

Our fund holders, CFT for Business members and their families are invited to join CFT staff at North Texas Food Bank for a day of serving the community. A wonderful opportunity for people of all ages to understand the importance of volunteering and giving back!