



## 2024-25 Program Syllabus and Schedule

### SESSION ONE: CFT 101: WHERE PASSION MEETS PURPOSE

**October 9, 2024 | 2:00–4:30 pm Session | 4:30-6:00 pm Optional Happy Hour**

To some, the term “philanthropy” is thought of as an exclusive club open only to those who can afford it. Beyond wealth and money, how else can a person give and engage with nonprofits in a meaningful way? In this session we will begin to explore the idea of aligning your values and passions with your giving goals, and how we need to redefine ‘philanthropy’ to include diverse perspectives and the giving of time, talent, treasure, and voice.

This session will feature a CFT overview and participation in a group exercise using CFT’s Identifying Values and Defining Passions cards. After the session, join us for an optional off-site happy hour at Columbian Country Club where you will have the chance to connect with your fellow cohort members and ELP alumni.

### SESSION TWO: EQUITABLE GRANTMAKING

**November 20, 2024 | 2:00-4:30 pm**

Before getting to the point of making a grant to an organization, it is helpful to understand the current philanthropic landscape in North Texas. This includes both opportunity and need within our community. In this session, the cohort will learn more about who we are as a region – our historical inequities and their continued impact on our community today – as well as how CFT approaches funding using an equity lens. Groups will have the opportunity to break up into small table discussions during the session.

### SESSION THREE: GRANTMAKING AND PLANNING

**January 15, 2025 | 2:00–4:30 pm**

This session provides an opportunity for cohort members to give input on the grantmaking process that will occur over the course of the program. This session will address what is important to you when you decide you may want to give to an organization, things to consider, and hopefully, address some misconceptions. It will include smaller group discussions and report-outs to the larger group.

The group will decide on a shared list of values and funding priorities in a workshop that will involve table discussions and a group vote on the focus issue areas. This work will provide CFT staff with the necessary framework to bring forward an array of nonprofits that vary in size and serve diverse populations that align with the cohort's funding priorities.

## **SESSION FOUR: FINDING AN EFFECTIVE NON - PROFIT CORPORATE GIVING LANDSCAPE**

**February 19, 2024 | 2:00-4:30 pm | 4:30-6:30 pm Optional Networking**

The cohort has a value statement and focused issue areas. This session focuses on strategies to determine an effective nonprofit. This session will focus on finding What tools can be used in assessing whether a nonprofit is actually effective or impactful – and what does that mean? We will hear from a panel of corporate partners who have provided insight into their philanthropic strategy and how CFT Center For Business Impact catalyzes positive change through nonprofits in North Texas.

## **SESSION FIVE: QUESTION AND APPLICATION WORKSHOP**

**March 26, 2025 | 2:00–4:30 pm**

Through the CFT Philanthropy team's vetting, using the ELP cohort's priority focus areas and values, six nonprofits will be invited to apply for funding from the group. This session will include group discussions on each of the proposals and will follow with a vote to determine which three will move forward in the funding process. Proposals will be provided prior to the session for your review. After the proposals have been reviewed by your groups, we will workshop, together, what questions you'd like the three nonprofit finalists to answer.

## **SESSION SIX: NONPROFIT FINALIST PANEL DISCUSSION**

**April 16, 2025 | 2:00-4:30 pm**

Applications and photos do not fully capture the work that nonprofits do in the community. During this session, the cohort will be able to ask questions and hear firsthand how each of the three nonprofit finalists operate and would use the funding. After hearing from each, a facilitated debrief and group discussion will help prepare the group for the final funding decision.

## **SESSION SEVEN: FUNDING AN ORGANIZATION + GRANT DECISION AND CHECK PRESENTATIONS**

**May 21, 2025 | 2:00–3:30 pm Session | 3:30–5:30 pm Optional Graduation Happy Hour**

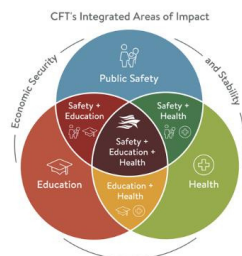
This session is when the cohort will make their final grant decisions with their \$500 grant to one of the three final organizations. Here, you will have the opportunity to advocate, discuss, and determine the outcome for the final grant to organization(s). The decisions will be made through an intensive workshop of table discussions and voting. There will be a celebration among cohort members following the grant decision with cohort members and nonprofit recipients.

# CFT's Key Initiatives



## COMMUNITIES FOUNDATION OF TEXAS

Supports community convenings on key issues, overall donor and nonprofit services and education, disaster recovery, and general operating support.



## CFT COMMUNITY IMPACT

Supports CFT efforts to create a healthy and thriving community for all, especially at the intersection of needs across health, wealth, living, and learning with focus on equity and connectedness.



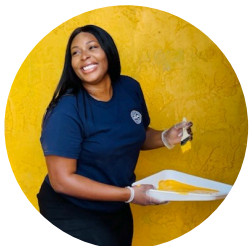
## CFT'S EMERGING LEADERS IN PHILANTHROPY

Educates and guides highly engaged, community-minded professionals ages 25-40 to ensure that our region's legacy of generosity continues to thrive and grow.



## CFT'S COLLIN COUNTY IMPACT FUND

Helps ensure that as Collin County grows, there will be dedicated resources to support the increasing needs for community services.



## CENTER FOR BUSINESS IMPACT

Partners with businesses to create lasting community impact through Strategic Giving, Employee Engagement, and Professional Development. We provide tailored solutions that align with corporate values, helping businesses maximize their impact and foster a purpose-driven company culture.



## CFT'S NORTH TEXAS GIVING DAY

Empowers every person to give back to their community by supporting local nonprofits and causes they care about. North Texas Giving Day is an annual event that builds awareness and support for nonprofits like nothing else. In 2024, North Texas Giving Day raised \$67.3 million benefiting over 3,200 local nonprofits.



## EDUCATE TEXAS

Helps improve outcomes for students through investments in college and career readiness, higher education, teacher effectiveness and regional collaboration across the state.

# CFT Staff Directory - ELP

**CAROLINE BROWN**

*Marketing and Communications Specialist  
Communities Foundation of Texas*  
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**TOP VALUES**

community, creativity, resilience

**ELIZABETH CORLEY**

*Business Engagement Officer  
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**TOP VALUES**

compassion, equity, curiosity

**LEXI MCCARTHY**

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**NICOLE PAQUETTE**

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**TOP VALUES**

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**MICHELLE MAI**

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**TOP VALUES**

relationships, community, education

**CANDACE THOMPSON**

*Community Philanthropy Officer  
Communities Foundation of Texas*  
**cthompson@cftexas.org**

**TOP VALUES**

integrity, community, collaboration



**EMERGING LEADERS  
IN PHILANTHROPY**  
at COMMUNITIES FOUNDATION of TEXAS





## ELP CHARITABLE GIVING FUND OPPORTUNITY

As part of our commitment to growing Emerging Leaders in Philanthropy, CFT has established a charitable giving fund type (also known as a donor-advised fund or DAF) to promote the continued education and activation of the next generation of philanthropists in North Texas. As a gift to members of our Emerging Leaders program, CFT will match your \$1,000 donation to help you establish your philanthropic path through a donor-advised fund at CFT. Donor-advised funds bring strategy and structure to your charitable giving to make your giving easy and efficient!

### Benefits of an ELP Donor-Advised Fund

#### Structure

- Available to individuals or couples participating in the ELP cohort
- \$1,000 minimum contribution to establish the fund, CFT will match for \$2,000 total
- Grants from your fund can be requested through our donor portal
- No CFT service fee for 2 years
- After 2 years service fee will be charged and a minimum of \$5,000 balance in fund

#### Flexibility

- Allows you and your family to stay personally involved in grantmaking
- Rather than gathering all charitable donation receipts over the year, make one easy, tax-deductible gift to your fund and CFT will grant to nonprofits at your direction
- Grants can be made to any active 501c3 nationwide

#### Maximum Impact

- Leverage CFT's expert staff and community knowledge
- Benefit from CFT's nonprofit due diligence
- Receive invitations to CFT fund holder events including nonprofit site visits and volunteer opportunities
- Make grants from your fund on North Texas Giving Day

### IT'S EASY TO OPEN A FUND AND START MAKING GRANTS!



#### Questions?

**Contact Michelle Mai**

*Senior Officer, Strategic Partnerships  
Communities Foundation of Texas*

**[mmai@cftexas.org](mailto:mmai@cftexas.org)**

## Session Three:

# GRANTMAKING & PLANNING



This session provides an opportunity for cohort members to give input on the grantmaking process that will occur over the course of the program. The group will decide on a shared list of values and funding priorities in an intensive workshop that will involve table discussions and a group vote on the focus issue areas. This work will provide CFT staff with the necessary framework to bring an array of nonprofits that vary in size and serve diverse populations that align with the cohort's funding priorities.

### Pre-Session Reflections

- What values do you think are important for the cohort to focus on?
- How would you define those values?
- What cause areas do you think are important for the cohort to focus on?
- Do you have a timeline for your personal giving (i.e. end of year, at a fundraising event, etc.)?

### Goals for Session Three

- Determine the cohort's values for funding
- Determine the cohort's issue areas for funding
- Determine the cohort's giving statement



# EMERGING LEADERS IN PHILANTHROPY GRANTMAKING TIMELINE

## Grantmaking & Planning

**January 15, 2025**



This session provides an opportunity for cohort members to give input on the grantmaking process that the group will participate in. Here, we will lay the groundwork for outlining our process for how grant funds will ultimately be awarded.



## Application Workshop Day

**March 26, 2025**



Through the CFT Philanthropy team's vetting, using the ELP cohort's priority focus areas and values, six nonprofits will be invited to apply for funding from the group. This session will include group discussions on each of the proposals and will follow with a vote to determine which three will move forward in the funding process. Proposals will be provided prior to the session for your review.



## Funding an Organization: Grant Decision & Check Presentation

**May 21, 2025**



This session is when the cohort will make final grant decisions. Here, you will have the opportunity to advocate, discuss, and determine the outcome of the \$25,000 available to award three finalists through another intensive workshop of table discussions, voting, and final group consensus.

To celebrate the completion of the program, we will present a check to each of the nonprofits and will host a celebration for the nonprofits and cohort!



## Finding an Effective Nonprofit & Philanthropy / Corporate Giving Landscape

**February 19, 2025**

What tools can be used in assessing whether a nonprofit is actually effective or impactful – and what does that mean? This session will address what is important to you when you decide you may want to give to an organization, things to consider, and hopefully, address some misconceptions. from CFT professionals and North Texas corporate leaders.



## Nonprofit Finalist Panel

**April 16, 2025**

Applications and photos do not fully capture the work that nonprofits do in the community. During this session, the cohort will be able to ask questions and hear firsthand how each of the nonprofit finalists operate and would use the funding. After hearing from the finalists, a facilitated debrief and group discussion will help the group prepare for the final funding decision.



EMERGING LEADERS  
IN PHILANTHROPY  
at COMMUNITIES FOUNDATION of TEXAS

# GRANTMAKING & PLANNING REFLECTIONS

After learning more about the grantmaking process, reflect on the questions below.  
Be sure to check out the session summary for key takeaways from this session.

**1. What was your biggest takeaway from today's session?**

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**2a. Based on the exercises in the last two sessions, what do you see as being your top issue area?**

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**2b. What initiatives come to mind when you think about these issue areas?**

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**3. Within each of your issue areas, are there specific sub-issues you have a greater interest in?**

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**4. Did today's session influence how you define your personal values?**

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**5. How does the information provided today inform or impact your values and/or giving statement?**

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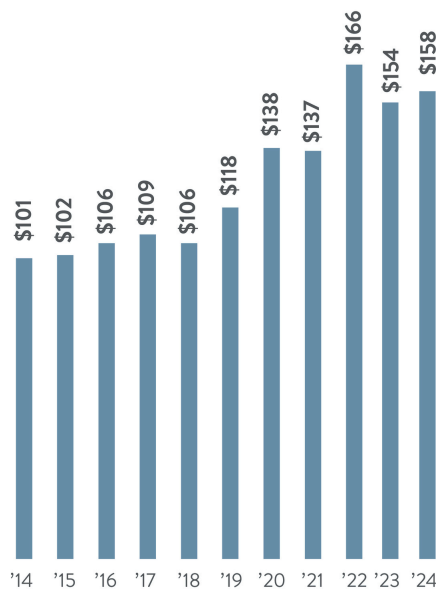
## SUMMARY

With the goal of building thriving communities for all, Communities Foundation of Texas works locally and across the state through a variety of charitable funds and strategic initiatives. The public foundation professionally manages 1,200+ charitable funds for individuals, families, companies, and nonprofits and runs several key initiatives such as CFT's NTX Giving Day, Educate Texas, and the W. W. Caruth, Jr. Fund at CFT. CFT has awarded \$2.2 billion in grants since its founding in 1953. See below for a snapshot of grants awarded in 2022 or learn more at [CFTexas.org](https://CFTexas.org).

**Detailed financials are available in our latest annual report at [CFTexas.org/Champions](https://CFTexas.org/Champions)**

## 2024 GRANTS: \$158 MILLION

TOTAL GRANTS PAID (in millions, unaudited)



2024 COMPOSITION OF GRANTS (in millions, unaudited)

## COMPOSITION OF GRANTS

FISCAL YEAR 2024

(in millions, unaudited)

<i>Donor-Advised Funds</i>	\$76
<i>Designated Funds</i>	21
<i>Scholarship Funds</i>	2
<i>Discretionary Funds</i>	6
<i>W.W. Caruth, Jr. Fund</i>	10
<i>Nonprofit Agency Funds</i>	43

**TOTAL GRANTS PAID** **\$ 158**

Another way Communities Foundation of Texas helps build a strong community is through donor-advised funds. There are many benefits to having a donor-advised fund including simplicity, flexibility, and providing maximum impact. Opening a donor-advised fund allows you to bring strategy and structure to your giving, as well as allows you to stay personally involved in the grantmaking process. By having a donor-advised fund at CFT, you are able to leverage CFT's expert staff and community knowledge.

## OPENING A DONOR-ADVISED FUND

**Opening a donor-advised fund is quick and easy:**

1. Talk with CFT staff to outline your charitable interests and the terms of your fund
2. Select a name for your fund
3. Give a tax-deductible donation to your fund and begin granting



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