



# THE LEADER

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## 85 Years of Good Works

We improve life in North Texas by connecting donors with nonprofits.

*The Dallas Foundation, which celebrates its 85th anniversary this year, reflects a community at its best: generous and grateful, concerned and visionary, wise and optimistic.*



You'd have to be optimistic to launch a charitable foundation in 1929, which is when we were established. A group of prominent business and civic leaders had wanted to create an institution that could accept gifts and bequests from local citizens who wanted to help the city. They founded the Dallas Community Trust in July 1929, about three months before the stock market crashed.

As you can see, we survived the Great Depression and World War II, and several military conflicts and economic crises since then. We're still here, doing good, and doing it more thoughtfully and effectively than ever. We think—we know—we improve life in North Texas by connecting donors with nonprofits that need and deserve support.

Those donors have made our 85th anniversary possible. We strive to provide highly individualized service and are honored to know our donors appreciate our efforts. In a national survey, we have twice earned the top rating for donor satisfaction among participating community foundations. The Center for Effective Philanthropy, which conducted



the survey, even highlighted The Dallas Foundation in a follow-up report released this year. What a tremendous compliment!

Last, we need to thank the men and women who have served as governors of The Dallas Foundation over the decades. They have given this institution deep community connections, top-notch professional advice, and a strong commitment to our mission. They, too, reflect the

best in our community, and we're proud to work for them and with them.

Mary M. Jalonick  
President



John P. Puckett III  
Chairman



The Critic Club, founders of The Dallas Foundation.

At The Dallas Foundation, we have a simple motto: **Here for Good**. Our goal is to serve our community, and the people who live here, forever. We do that by linking philanthropic resources with the agencies and programs that need and deserve them. The nonprofits we fund help educate, heal, shelter, feed, comfort, uplift and inspire residents of Dallas County. We work hard to lead and to listen, and to be responsive to both donors who entrust us with their dollars and the nonprofit agencies that seek funding from us. We all want to improve life in North Texas and the world beyond. When **we do good together**, we accomplish more.



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# 5



## A Funders Collaborative Grows Community

The Dallas Foundation helped launch the Zero to Five Funders Collaborative (ZFFC) to prepare youngsters for school. Eight years later, the collaborative's pilot project has met that goal—and produced many unplanned benefits. It's encouraged nonprofits and funders to develop and test new programs. It's growing neighborhood leaders. Perhaps most importantly, it has nurtured a sense of community among families, the nonprofits working on the project, and even among funders.

"To see a community being created is pretty rewarding," said former Dallas Foundation Governor Regen Fearon, who leads the collaborative. "It's a very collegial approach with a lot of mutual respect."

ZFFC began in the mid-2000s, when executives at The Dallas Foundation and Meadows Foundation started looking for ways to improve early childhood education in Dallas County. They began researching best practices and invited other foundations to join them.

After many discussions and site visits, the group, which had grown to

11 members, decided to focus on preparing young children for kindergarten in the Bachman Lake area of Dallas. The neighborhood had a high density of kids under age 5, most of whom were growing up in very low-income, Spanish-speaking households. Social services in the area were scarce.

The collaborative invited nonprofit agencies to submit proposals and ultimately selected AVANCE-Dallas, the Concilio, Catholic Charities of Dallas, Inc., and Lumin Education to provide services. The collaborative urged nonprofits to share resources, information and clients.

"The funders have a very strong vision for what they want to see," explained Tara Dunn, director of education at the Concilio. "But they've done a good job of listening to what we need."

The collaborative also hired a team from Southern Methodist University to evaluate the project's outcomes.

Those outcomes have been good. SMU researchers found that children from Zero to Five programs outperformed peers on reading-related skills in kindergarten. Parents from ZFFC

improved how they interacted with their children.

The anecdotal evidence is even more striking. There are a new Sam's Club, more parents volunteering, and a new Children's Medical Center Clinic in the area. Moms who previously felt isolated and powerless now talk about tutoring reading in schools—and even preparing to attend college themselves.

"We've seen the neighborhood change incredibly, and I'd like to think it's because of the work of the four agencies," said Anne Thomas, executive director of AVANCE-Dallas.

This fall, funders and service providers renegotiated responsibilities and funding. The plan is for each nonprofit to focus on a core program, building a scaffold of classes that helps strengthen families, then builds connections among families, and eventually forges links between families and the city around them.

"To be sustainable, we need the families in the neighborhood engaged," Regen Fearon said.

The collaborative's success has

influenced projects beyond Bachman Lake. AVANCE-Dallas and the Concilio are part of a new early childhood collaborative in Fort Worth. The three funders that established the Fort Worth initiative were involved in the Dallas project. And The Dallas Foundation helped create another funders coalition, this time targeting companion animal health and welfare.

### The pilot project has met goals – and produced many unplanned benefits.

Laura Ward, The Dallas Foundation's director of community philanthropy, confirmed, "Collaborations are the best way to make significant, lasting change."

For more information about The Dallas Foundation's early childhood projects, please visit [www.dallasfoundation.org](http://www.dallasfoundation.org).



## New Board Chairman

Brings Expertise in Education

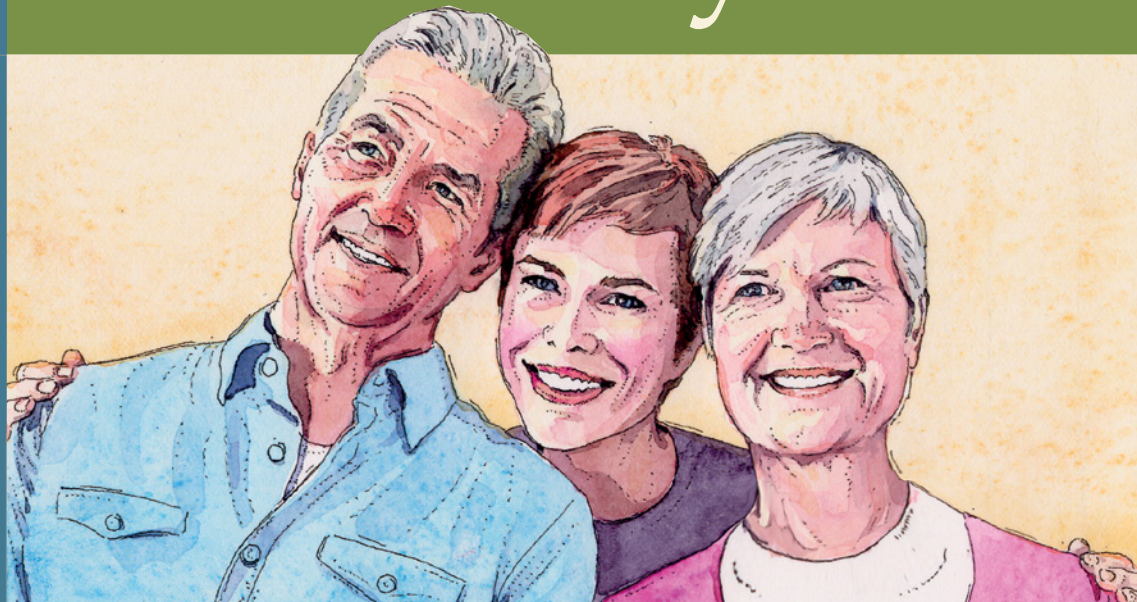
At a time when education may be the most critical issue facing Dallas, management consultant John P. "J." Puckett III has become chairman of The Dallas Foundation's Board of Governors. Puckett is a senior partner and managing director of The Boston Consulting Group and serves as global leader of the company's education practice.

"Our Foundation has become increasingly concerned about education, especially early childhood education, during the past decade," explained President Mary M. Jalonick. "J. has experience analyzing many kinds of educational organizations and issues. We're thrilled he brings that experience and knowledge to our board. He truly is the right man at the right time."

Puckett received a B.S. in computer science and religion from Duke University, then earned an M.B.A. from the Wharton School at the University of Pennsylvania. He is a member of the Dallas Citizens Council and serves on the boards of the Dallas Regional Chamber, Commit! and Teach for America (DFW). He joined The Dallas Foundation board in 2008 and was elected chairman in March.

>> Family Philanthropy Institute

## Keeping It in the Family



*It seems obvious: Charitable giving is intrinsically rewarding, so what could be better than giving together with those you love?*



Not much, but it's not always as easy as it sounds. Parents and offspring may support different causes. Discussions about money can be awkward. And children may want more control over giving than their parents had planned to yield. The Dallas Foundation's new Family Philanthropy Institute is designed to help families navigate all those issues.

"Donors often ask how to involve their adult children in charitable giving," said Lesley Martinelli, director of donor services. "And we've worked with them on a case-by-case basis. But we thought a Family Philanthropy Institute would be a better way to address that demand."

Family giving is a critical feature of the charitable giving landscape. In 2009, the Foundation Center counted 38,701 family foundations with combined assets of almost \$248 billion—and that doesn't include donor advised funds with strong family involvement.

And yet, while many donors establish family foundations or advised funds with the hope of someday including their children, they have no idea how to do that.

"Donor families are increasingly concerned about charitable traditions and the personalities of their children and grandchildren," said Virginia Esposito, president of the National Center for Family Philanthropy.

They need help articulating their philanthropic values, understanding their children's and grandchildren's concerns, and working together to develop a family giving plan.

"Family philanthropy implies shared giving," Esposito said.

The Dallas Foundation's new institute is modeled after its successful Women's Philanthropy Institute, which it started in response to women donors' desire to learn about local agencies and meet more experienced philanthropists. That institute is now in its seventh year, meets at least six times annually and has 50 members.

"The Family Philanthropy Institute also will be an affinity group," Martinelli said, "but it will have different structure and content. At its core will always be serving donors and their relatives: facilitating family meetings, interviewing family members and working through thought exercises to clarify values." Martinelli attended special training to hone her skills and learn about generational giving patterns.

One goal of the institute is to develop a learning community for families who want it. Martinelli said she envisions bringing in speakers to talk about multi-generational giving, and planning site visits or service projects for groups of families.

The institute also might plan informal social events where families can meet and learn from one another's experiences.

"We hope the new institute will grow and evolve just as our Women's Philanthropy Institute has," Martinelli said. "We're eager to learn more about what donors want and need, and to make giving together a rewarding experience for our donors and their families."

For information about the institute and family giving, please contact Lesley Martinelli at 214.741.9898 or [lmartinelli@dallasfoundation.org](mailto:lmartinelli@dallasfoundation.org).

Donors often ask how to involve their adult children in charitable giving.

Christopher Columbus Slaughter, better known as "C. C. Slaughter," built a West Texas land-and-cattle empire in the late 1800s. One of his sons, E. Dick Slaughter, created a charitable trust that continues to benefit The Dallas Foundation today. >>

(Photo below) According to *The Handbook of Texas*, C. C. Slaughter paid a record \$5,000 for his most famous Hereford bull, named Sir Bredwell, in 1899. One of his sons, E. Dick Slaughter, took a turn running the cattle business after his father's death in 1919.

## Generosity Ties Texas Pioneers to the Modern Metropolis

The Dallas Foundation didn't exist when Edgar Dick Slaughter was born in Palo Pinto County in 1873. He was the third son of legendary cattleman C. C. Slaughter, who amassed a fortune in land and livestock in West Texas. (According to several history books, Christopher Columbus Slaughter was at one time the largest single taxpayer in Texas.)

When E. Dick Slaughter died decades later, he shared his part of the family's wealth with his hometown of Dallas. His will established a trust that provided for his wife during her lifetime and designated three charities as beneficiaries after her death. Almost 80 years later, The Dallas Foundation, and the community it serves, still benefits from E. Dick Slaughter's gift.

"Income from the Slaughter Trust has provided hundreds of thousands of dollars to help prevent child abuse, provide medical care and feed hungry families," said Mary M. Jalonick, president of The Dallas Foundation.

The Dallas Foundation has other ties to our region's pioneers. The Annie L. Stevens Field of Interest Fund started as a bequest from an Oak Cliff native whose family settled in the area in the 1870s. (She and her brother gave Dallas the land that became the Stevens Park Golf Course.) The grandsons of G. H. Schoellkopf, who founded a successful leather goods company in Dallas in 1869, deeded property to The Foundation that continues to generate income for grants.

The Slaughter Trust is special because

it stretches back to the earliest years of The Foundation. A search of local historical documents gives only an outline of its namesake's life. E. Dick Slaughter's mother died when he was 2, his father remarried, had four more children, and raised all nine youngsters in one stately home in East Dallas.

E. Dick Slaughter attended the University

elder Slaughter died about five years later, in January 1935, when the car he was driving hit a bridge on Lemmon Avenue and careened into a creek. He was 61 years old.

Despite his untimely death, Slaughter's love for his community lives on in perpetuity. His trust has grown over time, which means his gifts to the community continue to grow.



of Texas and remained a loyal alumnus afterward. In turn-of-the-20th-century Dallas, he moved in prominent business, civic and social circles. He ran his father's cattle company for a time and became a partner in a rubber tire company. In a slightly tongue-in-cheek tome called *Makers of Dallas*, by the Dallas Newspaper Artists' Association, the authors stated: "Mr. Slaughter is an independent in politics, voting for such men and measures as, from his viewpoint, seem best for public welfare."

He married twice. His only child, E. Dick Slaughter, Jr., died in November 1929. The

"Donors like E. Dick Slaughter give us the flexibility to address local needs as they arise," said Gary W. Garcia, The Dallas Foundation's director of external relations. "We're grateful they trusted us with their legacy, and we work very hard to ensure that we invest and use their gifts wisely."

If you'd like to learn more about including The Dallas Foundation in your estate plan, please contact Gary Garcia at 214.741.9898 or [gwgarcia@dallasfoundation.org](mailto:gwgarcia@dallasfoundation.org).



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