

Summer 2021

# Leader



## The Power of Connection



[dallasfoundation.org](https://dallasfoundation.org)

Prioritizing Tomorrow's Dallas



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## Leader Summer 2021

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# Leading Off

Letter from Matthew Randazzo

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After over 14 months of working from home and social distancing, what I've missed most are the daily in person interactions—with our team, our donors, and nonprofit partners. I am an off-the-charts extrovert, so these moments energize me and translate the work of the Foundation into deeply personal experiences.

Yet, despite our time apart, a recent experience demonstrates that, as valuable as it is to sit across the table from a donor or beside a teammate during a meeting, what matters is the connection, the shared passion, and having a common purpose.

One Saturday afternoon in March, while watching my son's soccer game, I received a call from a former Dallas Foundation employee who now works in a lead logistics and operations role at Amazon. A planned donation drop off had fallen through and Amazon found themselves with a tractor trailer filled with fresh produce, bread, and other perishable items needing to be donated before the day's end. I immediately called my friend and colleague, Tricia Cunningham Clark, CEO of the North Texas Food Bank (NTFB), to make the connection. The delivery was re-routed and 26 pallets of fresh food made its way into the refrigerators at NTFB for distribution to individuals and families across North Texas. The Dallas Foundation covered the cost of the expenses incurred with the delivery, but more importantly, we quickly brought together people and organizations to serve our community and support our neighbors in need.

The power of connection lies at the heart of our work at The Dallas Foundation. We connect donors to the causes they care about and to effective ways to deploy their philanthropy. We connect nonprofits to grant dollars and to collaboratives and cohorts which strengthen their important work. And we connect today's Dallas to a future where our city becomes an opportunity rich community for all of our neighbors.

And whether we are standing six feet apart or side by side, it is both humbling and inspiring to witness what happens at the intersection of generosity, opportunity, community needs, and connections.

With gratitude for your continued partnership,

A handwritten signature in black ink that reads "M. Randazzo". The signature is fluid and cursive, with a large, stylized "M" and "R".

Matthew Randazzo  
President & CEO

## About Leader

*Leader* offers information and updates on The Dallas Foundation's strategic priorities, highlights nonprofit and donor partners deeply engaged in the work alongside us, and showcases our leadership, expertise, and catalytic investments.

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## About the Foundation

The Dallas Foundation brings together people, ideas, and investments in Greater Dallas so individuals and families can reach their full potential. Working closely with our donor partners, we share our expertise, leadership, and the opportunity to co-invest in solutions that match their interests and make a meaningful difference. We also support programs that benefit children ages birth to 3 as well as the civic priorities of Dallas, and prioritize partnerships that reduce intergenerational poverty and meet today's pressing needs while positioning Greater Dallas for a brighter, more equitable tomorrow.

#HereforGood

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## Contact Us

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The Dallas Foundation staff has grown and changed over the past year to match the evolving needs of the Foundation and our community. We are excited to introduce our newest team members and share key leadership announcements.



**Michael Sorrell**

**Board Chair**

Michael has served on The Dallas Foundation's Board of Governors since 2015, and is an active member of its Community Philanthropy Committee. He will lead the 16 members of the Foundation's Board of Governors

in building on the strategic plan adopted in 2019 and overseeing the governance of the Foundation's funds. Michael succeeds Jeanne Whitman Bobbitt as board chair.



**Torrey Littleton**

**Vice President of Finance**

Torrey has been promoted from Senior Director of Finance to lead a team of five and oversee all of the organization's financial functions. As a 9-year veteran of the Foundation, Torrey has built deep relationships

with many of our donors and community partners and brings an unparalleled knowledge of fund management to his new role.



**Drexell Owusu**

**Chief Impact Officer**

The Community Impact team is newly led by Drex as of April 2021. Drex stepped into the role of Chief Impact Officer in April, succeeding Helen Holman. He will focus his efforts on the Foundation's strategic priority

to reduce intergenerational poverty and ensure a strong and healthy start in life for children ages birth to 3. He will also oversee discretionary grantmaking through the Foundation's field of interest and community impact funds.



**Kezia Stegemoeller**

**Senior Director of Donor Engagement**

In October 2021, Kezia began a newly created role at the Foundation. In this position on the Philanthropic Partnerships team, she will lead and supervise Donor

Services, implementing a comprehensive donor engagement program for fund holders and prioritizing opportunities that support donors on their journey toward impact and outcomes.



**Michelle Schneider**

**Sr. System & Database Administrator**

Michelle became the newest addition to the team in May 2021 and brings a wealth of experience from her past corporate and nonprofit roles. She will oversee our donor database

management, gift processing, research, data integrity, and reporting.



**Leighton Watts**

**Director, Water Cooler at Pegasus Park**

As the organization relocates, Leighton will manage the day-to-day operations of the Water Cooler at Pegasus Park, producing programming, capacity building, and

collaboration opportunities for this unique community of social impact, nonprofit, and philanthropic tenants.



**Tori Phillips**

**Creative Services Manager**

Tori started at The Dallas Foundation in January 2021. With a background in creative project management, she serves as the creative consultant and graphic designer for the organization.



**Madalene Garcia**

**Development & Marketing Associate**

Madalene joined The Foundation in February 2021. Her experience in marketing, communications, and project management supports the Philanthropic Partnerships team.





# The Power of Connection

**Leveraging our leadership to ensure meaningful, measurable progress for children and their families in our community.**

For nearly a century, The Dallas Foundation has connected compassionate people to the causes they care about—improving lives and making visible progress throughout North Texas. Today, we continue to build on our track record of investing in transformational solutions and our legacy of convening, collaborating, and co-investing in what matters now, with a focus on outcomes for tomorrow. The following pages highlight work across our strategic priorities and showcase the impactful philanthropic investments that are moving the needle on reducing intergenerational poverty, advancing equity and inclusion, and responding to the civic priorities of Greater Dallas.



## Strategic Priorities



### Strong and Healthy Start

**T**he Dallas Foundation is dedicated to improving the quality of life for children in Dallas, ages birth to 3 years, with a particular focus on childcare, maternal health, home visitation, early learning, and brain development.

The Foundation recently granted Dallas-based Child Poverty Action Lab (CPAL) \$750,000 to support their mission of reducing childhood poverty in Dallas by 50 percent within a single generation.

The grant is the largest board-directed grant awarded to date and strategically aligns with the Foundation's work to ensure a Strong and Healthy Start for children, beginning with birth to age three. This investment will enable CPAL to launch a dedicated "Birth to 3 Care Team," and fund their continued work to educate North Texans about the issue of poverty in the metroplex, since 1 in 3 children grow up in poverty in Dallas.

"We know that one of the most effective ways to mitigate inequities and change the long-term odds for children that are born furthest from opportunity is to improve support for families during those children's first three years," said Alan Cohen, president & CEO of CPAL.

**“**Reducing intergenerational poverty by investing in the earliest years of a child's life will yield dividends for future generations and ensure that Dallas becomes an opportunity rich community for all of our neighbors.”

**Michael Sorrell**

Chair of The Dallas Foundation's Board of Governors

By supporting children during these early years, when researchers estimate 1 million new neuroconnections are made every second, there is a special window of opportunity to help children overcome the many structural barriers faced by low-income families and positively influence lifelong outcomes.

"Reducing intergenerational poverty by investing in the earliest years of a child's life will yield dividends for future generations and ensure that Dallas becomes an opportunity rich community for all of our neighbors." said Michael Sorrell, Chair of The Dallas Foundation's Board of Governors.

*For more information about CPAL, please visit [childpovertyactionlab.org](http://childpovertyactionlab.org).*

# Advancing Equity & Inclusion

Last fall, The Dallas Foundation awarded H3Diversity a \$55,000 grant to engage a group of nonprofit organizations in its inaugural Diversity Equity and Inclusion (DEI) Cohort, an immersive journey which enables individuals and organizations to better incorporate DEI practices into their work. Kim Manns, CEO of H3Diversity, began conducting trainings earlier this year with board and staff representatives from six diverse organizations: Bachman Lake Together Family Center, Jubilee Park & Community Center, United to Learn, Dallas Afterschool, Act for Justice, and Texas Ballet Theater.

The program is built on the belief that creating pathways where informed heads and empathetic hearts move hands into purposeful action is the key to addressing racial inequities. After the third full day training in May, conducted virtually, Kim and the cohort participants are experiencing both the complexity and positive results of providing a safe space for peer understanding and learning.

Marissa Castro Mikoy, president and CEO of Jubilee Park & Community Center, admits that talking about systemic barriers and racism are difficult conversations to have. In her experience, however, the cohort has created a dynamic which allows participants to learn together and equips them with pragmatic strategies to have these conversations nonetheless. She shared that “Everyone’s on a different point on their DEI journey. This program offers a common denominator from which to start the conversations and pushes all of us, while not shutting anyone down.”

The cohort model also offers a cost effective way for organizational leaders to gain a baseline understanding of incorporating DEI into their work and to help them define organizational priorities and goals in this area for the next three years. Four of the six organizations have already invested in scaling the program to engage their full boards and staff, including offering bilingual Zoom sessions.

During the remaining sessions, cohort participants will receive assistance to implement the technical elements of the work, such as conducting a racial equity impact analysis and DEI assessments, disaggregating data, and conscious communication.



“Everyone’s on a different point on their DEI journey. This program offers a common denominator from which to start the conversations and pushes all of us, while not shutting anyone down.”

**Marissa Castro Mikoy**

President and CEO of Jubilee Park & Community Center

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*To learn more about H3Diversity, please visit [hhdiversity.com](http://hhdiversity.com).*





# Your **legacy** tells the story of your **life**.

**Lynore and Robbie Robinson** began working with The Dallas Foundation in 2014, when they established a donor advised fund. Over the next six years, the Foundation's team of experts worked closely with the couple, establishing a deep relationship with them, learning about their interests, and documenting the philanthropic legacy they wanted to leave. Since their passing, the Foundation continues to steward and fulfill the Robinson's philanthropic goals.

## What's your **story**?

Impact your community today and tomorrow. The Dallas Foundation can work with you and your advisors to develop a charitable giving plan that spans generations, making a powerful difference in the lives of your loved ones, your community, and future generations.

Learn more about the Robinson's story, **planned giving**, and how you can leave a legacy for your **community** at [dallasfoundation.org/plannedgiving](https://dallasfoundation.org/plannedgiving).

Contact Us

**Kim Montez**

Director, Gift Planning & Family Philanthropy  
[kmontez@dallasfoundation.org](mailto:kmontez@dallasfoundation.org)



## 2021 Professional Advisor Seminar

The Winds of Change: Recent Developments in Federal Income, Estate and Gift Taxes

featuring Keynote Speaker

**Samuel A. Donaldson, JD, LL.M.**

Professor, Georgia State University College of Law

**Friday, September 24**

7:30 - 10:30 a.m.

**Pegasus Park**

3000 Pegasus Park Dr.  
Dallas, TX 75247

[dallasfoundation.org](https://dallasfoundation.org)

In-person & virtual ticket options available. Visit our website to learn more about continuing education credits.



Thompson Knight





# Civic Priorities of Greater Dallas

## Long-term Partnership Allows Immediate Response to Winter Storm

The Mayor's Disaster Relief Fund was established at The Dallas Foundation in 2005 to help the City shelter Hurricane Katrina evacuees and has spanned four mayoral administrations in Dallas. This long and trusted partnership allows the Foundation to serve as the recipient of philanthropic dollars during moments of crisis and to deploy those resources to the community quickly.

The most recent example of this partnership came in response to the devastating Winter Storm Uri, when the Fund distributed over \$1.3 million to area nonprofit organizations helping residents recover.

All grants are approved by the Mayor's Disaster Relief Fund advisory committee chaired by former U.S. Ambassador and current Hunt Consolidated Senior Vice President, Jeanne Phillips, and staffed by Dallas Foundation President and CEO, Matthew Randazzo; UT Southwestern Vice President for Community and Corporate Relations, Ruben Esquivel; The Beck Group's Executive Chairman, Peter Beck; Dallas City Manager, T.C. Broadnax; and Mayor Johnson's Chief of Staff, Mary Elbanna.

“The Mayor's Disaster Relief Fund provides the perfect example of what can happen when a community of donors comes together for a common purpose.

**Matthew Randazzo,**  
President and CEO of The Dallas Foundation

“The Mayor's Disaster Relief Fund provides the perfect example of what can happen when a community of donors comes together for a common purpose,” said Matthew Randazzo, President and CEO of The Dallas Foundation. “Bringing together gifts from corporations, foundations, and individual donors has resulted in our ability to support their ongoing response to our neighbors affected by the winter storm.”

Grants from the Fund for winter storm recovery were made possible by donations from Mark Cuban, the Dallas Mavericks, Sempra Energy, Kroger, the Siebert Williams Shank Foundation, Myers Financial Corp., the Boston Celtics Shamrock Foundation, the National Basketball Association, the Zierk Family Foundation, the Addy Foundation, the Greater Dallas Taiwanese Chamber of Commerce, and others.



above: City of Dallas Mayor Johnson accepts a gift to The Mayor's Disaster Relief Fund (photo courtesy of The City of Dallas)

## COVID-19 Response and Continued Recovery

At the onset of the pandemic, the Foundation established The Dallas Foundation COVID-19 Relief Fund, kick-started with contributions from The O'Donnell Foundation, the Beck Family Office, and The Rees-Jones Foundation. The fund quickly mobilized over \$1.2 million in donations. This generous and timely support combined with other funds held at the Foundation ultimately exceeded \$3.2 million, allowing for immediate deployment of resources to nonprofit organizations serving Dallas' most vulnerable populations while sustaining their own operations.

One of the earliest grant distributions was a gift to Parkland Foundation from the Louis B. and Mary Ratliff Critical Needs Fund, which helped the hospital expedite access to COVID-19 test kits eight times faster than

## COVID-19 Response and Continued Recovery *(continued from pg. 9)*

before and reduce the turnaround time for testing results from 5-7 days to two hours. The COVID-19 Relief Fund also provided support to Baylor's Employee's 1st Emergency Assistance Fund which provided meals, hotel reimbursement, and childcare for frontline healthcare workers treating COVID-19 patients. Carter BloodCare, another grant recipient, was able to maintain staff levels and provide an uninterrupted blood supply to hospitals. In total, hundreds of organizations benefitted from the Foundation's donors' unwavering support for this community.

Now, as more people take advantage of vaccines, mask mandates are loosened, and pre-pandemic activities cautiously resume, it's paramount to not forget the lingering economic impact resulting from over 15 months of global disruption. Many people, within the Dallas-Fort Worth metroplex and abroad, face the end of programs and benefits enacted during 2020 that provided safety nets to those affected by the virus, including the un-

or under-employed. Among those programs is a CDC moratorium that prevented evictions for individuals meeting certain criteria, among them that they were unable to make full rental or housing payments because of loss of income. That moratorium is currently scheduled to end on June 30, 2021 and threatens the housing stability of tens of thousands in the Dallas metropolitan area.

In partnership with several of our fundholders, The Dallas Foundation is deploying approximately \$50,000 toward eviction legal defense and eviction settlement funds. We invite you to support this effort and have reactivated our COVID-19 Fund to accept contributions to help families remain in their homes.

**If you want to learn more about our response to the eviction crisis or want to get involved, please reach out to Julie Diaz, Chief Partnerships Officer, [jdiaz@dallasfoundation.org](mailto:jdiaz@dallasfoundation.org).**



## The Dallas Foundation's New Home

**Foundation joins the Water Cooler at Pegasus Park, holds leadership role among social impact tenants.**

**A**s of June, The Dallas Foundation has a new address, joining other changemakers in the nonprofit sector who will call the repurposed oil industry campus home. Sponsored by Lyda Hill Philanthropies in partnership with J. Small Investments, Pegasus Park includes a newly renovated 18-story office tower, which will house a community of nonprofit, social impact, commercial, and biotech and healthcare-related tenants including UT Southwestern's Office for Technology Development. The building also features a conference center and dining venues.

The Director of the Water Cooler at Pegasus Park, Leighton Watts, sits on The Dallas Foundation's team and will provide operational and programmatic support to the nonprofit and social sector tenants in order to amplify their impact and effectiveness while curating a vibrant and connected campus community.

The Foundation plans to resume in-office operations in July and looks forward to welcoming you to Pegasus Park!



# Opportunities to Convene, Collaborate, & Co-invest



## Interested in Joining WPI?

For more information on how to become a member of this dynamic group, email **Kim Montez** at [kmontez@dallasfoundation.org](mailto:kmontez@dallasfoundation.org) or learn more at [dallasfoundation.org](http://dallasfoundation.org).

## The Mary M. Jalonick Women's Philanthropy Institute

The Mary M. Jalonick Women's Philanthropy Institute (WPI) brings together over 50 passionate members who dedicate time throughout the year to learn about local organizations, listen to experts discuss current issues, and work together for the betterment of the greater Dallas area.

The mission of WPI is to educate, inspire, and empower women to become confident and engaged donors at every stage of their philanthropic journey while connecting them with the needs of the community and the organizations addressing those needs.

WPI members vote on issue areas to explore during the year, and in 2021 chose to focus on racial equity, women's initiatives, mental health, and early childhood. This year's selected organizations include Girls Embracing Mothers, Act for Justice, Metrocare Health, Hope Supply Co., and Jubilee Park & Community Center. Each organization hosts a Site Visit for members during which they provide an in-depth discussion of their mission, successes, and challenges.

At year end, members will vote for one nonprofit to win the lead grant of approximately \$50,000. All other organizations visited will also receive a major grant. In 2020, members granted \$150,000 to local nonprofit organizations in the area, underscoring the power of collective giving.



## Family Philanthropy by Design

Giving together as a family can be an uplifting, rewarding experience. But it also takes some planning. Even the most philanthropically inclined families must think about when, to whom,

how, and how much to give. Whether your family consists of two or twenty, one generation or several, The Dallas Foundation's team of philanthropic experts can design a suite of family-focused services tailored to your unique situation.

We provide resources, expertise, and support to transform your values into effective giving that makes a lasting impact on the causes most important to you.

This fall, the Foundation will host a family philanthropy event with speaker, Nick Tedesco, President and CEO of the National Center for Family Philanthropy. More details to come in the following weeks.

**For more information about Family Philanthropy, contact Kim Montez, Director of Gift Planning and Family Philanthropy, at [kmontez@dallasfoundation.org](mailto:kmontez@dallasfoundation.org).**

## A Trusted Partner and Resource for Professional Advisors

Estate planners, financial advisors, accountants, and attorneys are trusted partners in a unique position to help clients on their philanthropic journey. With our deep community knowledge and nonprofit expertise, The Dallas Foundation can work alongside you to help create and implement a strategy to meet your clients' financial and charitable goals. Together we can help the individuals and families you work with achieve maximum impact and meaning.



The Dallas Foundation also offers networking and learning opportunities for professional advisors, including the annual Professional Advisor Seminar featuring timely and engaging topics and continuing education options. The Foundation also hosts an invitation-only breakfast series for advisors focused on what matters in Dallas and in philanthropy.

Registration for the **2021 Professional Seminar** is now open and available at [dallasfoundation.org/PAS2021](http://dallasfoundation.org/PAS2021).

**If you are interested in participating in the breakfast series, please reach out to Gary Garcia, Sr. Director of Philanthropic Partnerships, at [gwgarcia@dallasfoundation.org](mailto:gwgarcia@dallasfoundation.org).**



# Upcoming Events

Visit [dallasfoundation.org](https://dallasfoundation.org) for additional information on upcoming events and activities.



## August 11

### Lunch & Learn

WPI members will learn about mental health issues affecting women and children with speaker, Tegan Henke of the Meadows Mental Health Policy Institute.



## September 24

### Professional Advisor Seminar

Register to hear keynote speaker, Samuel A. Donaldson, JD, LL.M, discuss *The Wings of Change: Recent Developments in Federal Income, Estate and Gift Taxes*.



## October 14

### Family Philanthropy

Want to give as a family? Learn more about family philanthropy with speaker, Nick Tedesco, President and CEO of the National Center for Family Philanthropy.



## December 8

### Year-End Grantee Luncheon

WPI members come together to once again hear from the organizations visited in 2021 and to award grants from the WPI Grant Pool.