

Nonprofit Agency Funds



Empower Your Mission with
Expert Fund Management





Photo courtesy of Scottish Rite

2x

Nonprofits with strong financial oversight are twice as likely to meet long-term goals and attract major donors.

Source: Stanford Social Innovation Review

41%

of nonprofit leaders say administrative and compliance burdens are a top challenge.

Source: Center for Effective Philanthropy

The Power of a Nonprofit Agency Fund

Take advantage of professional fund oversight, reduced administrative work, and a trusted partner invested in your long-term success

When your organization opens a Nonprofit Agency Fund with The Dallas Foundation, you gain more than just an investment account—you gain a partner committed to helping you advance your mission with confidence and clarity.

These funds are designed to streamline your financial management, reduce administrative burdens, and provide peace of mind that your assets are being carefully stewarded by experienced professionals. You retain full control over how grants are distributed, while we handle the accounting, compliance, and investment oversight.

Whether you're looking to build long-term stability or manage short-term resources efficiently, a Nonprofit Agency Fund gives your organization the tools and flexibility to grow with purpose.

Your Mission, Backed by Our Stewardship

Experience, efficiency, and investment strength—so you can focus on what you do best.

Partnering with The Dallas Foundation means your organization receives the highest level of fund oversight—delivered with local insight and deep nonprofit experience. We offer a comprehensive solution that reduces administrative workload while strengthening the financial health of your organization.

Here's what you can expect when you open a Nonprofit Agency Fund with us:



Trusted Stewardship

We serve as a fiduciary partner, ensuring funds are managed in compliance with legal and ethical best practices.



Investment Expertise

Our pooled investment strategy grants access to institutional-quality asset classes and reduced fees, helping your fund grow efficiently.



Operational Efficiency

From fund accounting and performance reporting to monitoring regulatory changes, we take care of the administrative tasks so you can focus on impact.



Mission-Aligned Flexibility

You retain control over distributions aligning use of funds directly with your organization's goals.

As the first community foundation in Texas, The Dallas Foundation brings decades of experience in serving nonprofits across the region. When you partner with us, you're not just managing a fund—you're building financial confidence for your future.

Discover how a Nonprofit Agency Fund can help your organization grow and thrive for years to come. Connect with our team at The Dallas Foundation to start the conversation:



Gary García

Vice President of Philanthropic Partnerships
214.694.2507
gwgarcia@dallasfoundation.org

Flexible Options to Support Your Goals

Every nonprofit is different—and so are its financial needs. Whether you're building a permanent source of income or managing resources for a specific campaign, The Dallas Foundation offers flexible fund options designed to support your goals, timeline, and mission.

	Endowment Fund	Non-Endowed Fund
 Purpose	Long-term financial sustainability	Flexible support for immediate or short-term needs
 Structure	Permanent pool of assets that generates annual income	Fully expendable fund, available as needed
 Distributions	Typically 4–5% annually, preserving principal	Withdraw funds based on your timeline and needs
 Use Cases	Operational support, special projects, lasting legacy	Capital campaigns, operating reserves, short-term initiatives
 Advantages	• Reliable annual income • Protects assets from future misuse • Ideal for legacy and stability	• Full access to funds • Customizable investment strategy • Adaptable to evolving priorities

Real Impact, Real Results

Our partners say it best—see how fund management has helped them focus on what matters most

Nonprofits across North Texas partner with The Dallas Foundation to manage their funds with confidence. Whether supporting a capital campaign or building an endowment, our partners trust us to provide expert guidance, investment stewardship, and long-term support.

How Jubilee Park Is Securing Its Future for Generations to Come

For nearly three decades, Jubilee Park & Community Center has been a cornerstone of opportunity and belonging in South Dallas. What began as a neighborhood initiative has grown into a comprehensive community organization serving more than 4,000 individuals each year across five pillars of impact—Education, Opportunity, Housing & Workforce, Health, and Safety.

As Jubilee expanded its reach and ambitions, its leadership recognized the need for long-term financial security that could withstand fluctuations in funding and economic uncertainty. Establishing the Jubilee Endowment at The Dallas Foundation became a pivotal step toward that goal.

“When the Jubilee Endowment was established, it was intended as a fail-safe to protect operations and sustainability as the organization grew,” says Christian Staley, Chief Advancement Officer at Jubilee Park & Community Center. **“Our founders had deep trust in The Dallas Foundation as a leader in philanthropy and felt confident our endowment would be soundly managed by an entity we could depend on.”**

That confidence has only deepened over time. The Dallas Foundation’s stewardship of the Jubilee Endowment has provided not just financial oversight but also a true partnership rooted in shared community values. Beyond fund management, the Foundation’s team has helped Jubilee identify new donors, secure additional grants, and connect with peers across the nonprofit sector to share best practices and collaborate on community-driven solutions.

“The Dallas Foundation has supported us in so many ways—through fund management, individual donor connections, and grant opportunities,” says Staley. **“Their team understands our mission and has consistently gone above and beyond to help us strengthen it.”**

To date, over \$1.7 million in collective giving through The Dallas Foundation has strengthened Jubilee’s capacity to serve its neighbors and plan for the future. That support has helped launch the Jubilee Park Community Clinic, open a new Food Pantry, and expand afterschool programs to reach more students. Each initiative reflects a sustainable approach to community building—one that aligns perfectly with The Dallas Foundation’s mission of ensuring a strong and thriving Dallas for all.

Looking ahead, Jubilee’s focus remains on equitable housing and sustained belonging. With its endowment providing a foundation of financial resilience, the organization is actively implementing its *Equitable Development Plan*—working to preserve generational wealth, create affordable housing, and maintain a vibrant, mixed-income community where every resident feels safe, healthy, and supported.

“The Jubilee Endowment ensures that our mission will remain strong, even in unstable times,” Staley adds. **“Our multifaceted partnership gives Jubilee access to the financial security and community support we need to plan boldly for the future.”**

Photos courtesy of Jubilee Park & Community Center





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Web
[dallasfoundation.org](#)

Phone
214.741.9898

Address
3000 Pegasus Park Dr., #930 Dallas, TX 75247