

THE DALLAS FOUNDATION

Here for Good

LEADER

Meyerson explains his motivations for giving

LIFE CHANGES PRESENT UNEXPECTED OPPORTUNITY FOR PHILANTHROPY

About a decade ago, local business legend Morton H. Meyerson decided to stop adding to his personal wealth. He still planned to make money, he just didn't plan to keep it.

Mr. Meyerson reached that decision after a series of momentous personal events, some tragic, some satisfying. His only son had died. He had retired – for a second time – after serving six years as chairman and CEO of Perot Systems. He had established trusts to provide for his family. He was ready to devote his intellect, heart and earnings to tzedakah, his Judaic duty to give.

In Hebrew, tzedakah means 'required justice or giving,' explained Mr. Meyerson, who has traveled to Israel to study Jewish scripture and commentaries. "It's a requirement. You've got no choice, if you have extra."

Mr. Meyerson described his evolution as a philanthropist to about 140 donors, professional advisors and others at The

Dallas Foundation's annual Spring Philanthropy Forum on May 4. The event was held in the main ballroom of the newly renovated Union Station in downtown Dallas. The forum's theme: giving in troubled economic times.

"I've had to call people and say, 'I'm going to fund you through 2009, and I have no idea what happens after that,'" he said.

But he emphasized that he will not stop giving. He attributed his personal

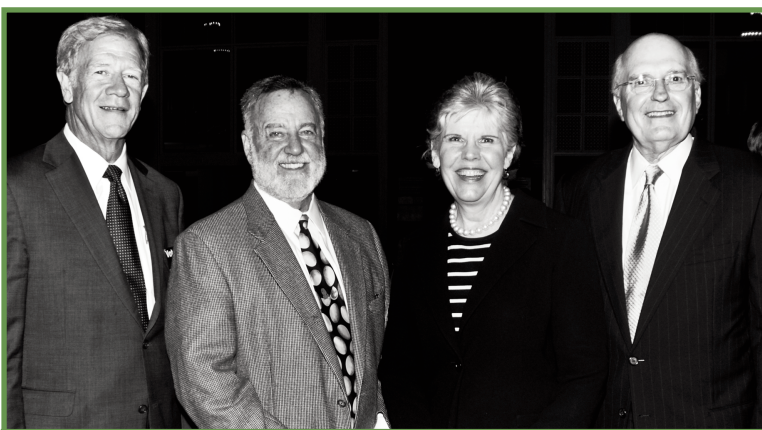
commitment to charity to two related sources: his family and his Jewish faith. He recalled that, when he was a boy in the 1940s, his grandfather would give him a quarter – with instructions to put at least five cents of it in a charity collection box.

"The reason our family foundation

exists is because of my parents and grandparents, who said, 'If you have a surplus or extra, you have an obligation to share it with those in need,'" he said.

He explained that Judaism commands the faithful to take care of their families, of widows and orphans, the poor, and those who are strangers – a reference, he said, that originally

(PHILANTHROPY FORUM continued on page 2)



More than 140 people attended The Dallas Foundation's Spring Philanthropy Forum on May 4. Pictured here (left to right) are John Field Scovell, a former Dallas Foundation governor, keynote speaker Mort Meyerson, Foundation President Mary Jalonick and John Castle, current chairman of the Board

John Castle, chairman of the foundation's Board of Governors, introduced Mr. Meyerson. He described his friend and former colleague from EDS as a man who "encourages his friends to give – and give thoughtfully."

Mr. Meyerson began by acknowledging that the financial crisis of the past few months "has weighed heavily on my psyche."

SAFETY NET
FUND UPDATE*When help is
needed most*

Philanthropy can't cure the country's ailing economy, but it is keeping the current economic illness from turning fatal for some Dallas County nonprofits. The Dallas Foundation's Safety Net Fund offers emergency financial assistance to local agencies that meet basic human needs. Established late last year, the fund has provided \$1,080,900 in aid through the first half of 2009.

"It has helped us tremendously," said Jana Barker, executive director of Brighter Tomorrows, a Grand Prairie-based shelter program for victims of sexual and domestic violence. Her agency received \$50,000 in March after it experienced both an increase in clients and a sharp decline in revenue.

"Calls to our hotline have doubled since 2007," Ms. Barker explained. "But we lost a huge federal grant, and we've had to let staff go. The \$50,000 has helped us so much."

Dallas' Safety Net Fund reflects one of the few encouraging trends to emerge from the current economic crisis: private philanthropy has remained active and engaged even though many donors and foundations have suffered significant losses. The Council on Foundations estimated that the total value of all foundation endowments dropped by about 30 percent since the end of 2007. And that drop in asset value has forced many foundations to trim their operating and grant-making budgets.

But in a recently released (SAFETY NET continued on page 4)

Tzedakah, giving in times of hardship

A few days after the Spring Philanthropy Forum, Mort Meyerson forwarded a commentary to The Dallas Foundation on the concept of tzedakah, or required giving. It was written by a former community organizer, Alana Alpert, and published by American Jewish World Service on its website. Ms. Alpert reflects on upholding tzedakah in times of hardship. She cites a passage from Leviticus that commands farmers not to reap to the edges of their fields, or glean their fields, because that much must be left for the poor and the stranger. "It does not clarify whether the farmers had a good or bad crop yield. Thus, whether I have earned a lot or a little this year, I am still required to give enough for those who have less than I do," Ms. Alpert notes.

"Our challenge is to remember our obligation to the poor always, in times of plenty and in times of need... Let us rise above our natural reaction to hoard out of pride and fear, and rather, to sanctify our harvests through generosity."



Celebrating our past success and looking toward our future

P R E S I D E N T ' S M E S S A G E



Mary M. Jalonick

The Dallas Foundation has something to celebrate: we're 80 years old! We were founded in June of 1929 as the Dallas Community Trust.

As you may recall, 1929, like 2009, wasn't an auspicious year for financial markets. But we survived. Dallas survived. Our nation

survived. However tough today's economic challenges are, if we all work to care for one another and our community, we will survive this crisis too.

In fact, we are seeing some encouraging successes and collaborations among nonprofits despite – and sometimes because of – the economic slowdown.

At a local level, the new DonorBridge initiative far surpassed our expectations. Our foundation was proud to help Communities Foundation of Texas and the Center for Nonprofit Management launch this online giving resource, which provides detailed profiles of hundreds of Dallas-area nonprofits. DonorBridge made its debut on May 20, which Mayor Tom Leppert proclaimed "Dallas Giving Day." On that day and a special preview day, May 19, for our donor-advised fund holders, more than 8,000 donors gave \$4.2 million to 345 agencies. To see such generosity during the recession – and during a time of year when

donations typically lag – gives us great optimism for our community's future. To learn more about the new website, please visit donorbridgetx.org.

Foundations are collaborating with new partners at the national level, too. The Council on Foundations is working with several other organizations to examine how philanthropy can promote lasting change in communities. The U.S. Conference of Mayors, Living Cities, CEOs for Cities and the Funders Network for Smart Growth and Livable Communities are among the groups that will participate in cross-sector discussions at the fall community foundation conference in San Antonio. These meetings will help foundation executives and policy makers get to know and learn from one another – with the long-term goal of making public-private partnerships more effective and enduring. That will be useful in good times and bad.

It is tricky figuring out how to do philanthropy during lean times, but we gratefully accept the challenge. We will be here for our community when it needs us most.

With good wishes,

Mary M. Jalonick, President



PHILANTHROPY FORUM (Continued from page 1)

meant Gentiles living in Jewish communities.

So as he prepared for retirement, Mr. Meyerson set aside money for his family to meet the first obligation. Then he slowly changed from what he called "check-writing philanthropy" to "guerrilla philanthropy." He now actively researches causes and organizations, visits agencies and meets staff members, and watches for results, but he prefers to give anonymously. He has supported groups in Dallas, Israel, India and many places in between.

With lesser-known organizations, he likes to give relatively small, monthly contributions and then help them raise additional money. Many of those groups accomplish extraordinary things, he said.

"A small, highly motivated group of

people can do anything," he said, noting that EDS had only 54 employees when he started at the company.

Mr. Meyerson described three programs he felt tackled enormously difficult problems in creative – and effective – ways. One agency, the American Jewish Joint Distribution Committee, had

helped children and parents who had lived through the Holocaust. Its leaders wanted to use that experience to help youths who had survived the Rwandan genocide of 1994.

"That is an incredible idea," Mr. Meyerson said.

He also contributes to a group that brought clean water to an Ethiopian Jewish tribe – which then became a

project to provide clean water to their Muslim and Christian neighbors too. And he supports the Turner Twelve, a program started by a sportswriter-turned-educator to nurture 12 South Dallas youngsters through

school and college.

Some gifts don't achieve what he hoped they would, and he will withdraw funding when necessary.

"When you give money, you take risk," he said. "You minimize the risk, but you cannot control the nonprofit.

Failure is part of the program. You have to press on."

Tzedakah allows no excuses for not giving, he said. Those who have less wealth than they used to, but still more than enough to meet their needs, could scale back their standard of living slightly to continue giving, suggested Meyerson. And while he feels bound by a religious duty to give, Mr. Meyerson said it's acceptable for people to give simply because their accountant told them they needed a tax deduction.

"I think people should give because they have a surplus, and they want to give, and they love their community," he said. But, he said, paraphrasing a revered 12th century Jewish commentator who wrote about charity, "Even the least favored way of giving is still giving."

"Then he [Mr. Meyerson] slowly changed from what he called 'check-writing philanthropy' to 'guerrilla philanthropy.' He now actively researches causes and organizations, visits agencies and meets staff members, and watches for results..."

Celebrating 80 Years Together

DONOR PROFILES

The Dallas Foundation turns 80 this summer! To celebrate, we're interviewing some of our donors and former governors who also have passed that milestone. We're amazed at what we're learning. There's a reason this demographic group has been called "the greatest generation" – they survived the Great Depression, fought in World War II and brought the United States through the Cold War and the Civil Rights movement. Closer to home, they helped create or improve institutions and agencies that shape life in our community today. Here's a sample of what we've learned about The Dallas Foundation's most senior donors and former governors.

TDF GOVERNORS & DONORS MATCH GAME

See if you can match the statement with the correct individual:



Robert Melvin

1. I was a 17-year-old soldier headed for Okinawa when World War II ended. I ended up serving two years of occupation duty in Japan. Now I lead the board of the Teacher Retirement System of Texas.



Ellen Solender

2. I became an attorney because the chief of the Dallas County Juvenile Department lied to me about conditions there.



C.J. "Tommy" Thomsen

3. I moved to Dallas for a job at Geophysical Services, Inc. (now Texas Instruments) partly because I liked the people there and partly because of a fabulous dessert. I also established The Dallas Foundation's first donor-advised fund.



Linus Wright

4. A friend arranged a date for me, and we liked each other so much that we got engaged six weeks later.

Want to learn more about these remarkable people? Please go to our website, dallasfoundation.org, and read the full interviews of these donors and former governors. If you'd like to be mailed the extended version of the interviews, please contact Lesley Martinelli at 214.741.9898.

Answers: 1. Linus Wright; 2. Ellen Solender; 3. C.J. "Tommy" Thomsen; 4. Robert Melvin

2nd Annual Grantee Recognition Event



The second annual Grantee Recognition Event drew a crowd of nonprofit executives and board members to The Dallas Foundation's offices on March 24. More than 75 agencies from North Texas and beyond received grants from The Dallas Foundation's unrestricted and field-of-interest funds in 2008. Recipient organizations tackle issues ranging from animal welfare to hunger to veterans' mental health needs. In this photo, left to right, Peter Smith and the Rev. Peter Verhalen of Cistercian Preparatory School talk with The Dallas Foundation Governor Phil Ritter. Cistercian, a Catholic school in Irving, received a grant to help renovate classrooms.



Women's Philanthropy Institute

The Women's Philanthropy Institute started its 2009 season with a behind-the-scenes tour of the Southwestern Medical District on March 31. Participants visited the Simmons Ambulatory Surgery Center, Parkland Memorial Hospital's Emergency Department and the Heart Hospital at Children's Medical Center. The event ended with a lunch sponsored by Parkland Foundation at the University of Texas Southwestern Medical Center and a discussion about the construction of a new Parkland Hospital. Attendees included (clockwise, starting from upper left) Fredye Factor, Jean Karotkin, Beverly Blumenthal, Sarah Losinger and Mary Jalonick.



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SAFETY NET FUND

(Continued from page 1)

survey, the council also found that many foundations are making special efforts to help families harmed by the economic downturn. More than 80 percent of foundations that have previously assisted such families plan to maintain past funding levels for those programs. Thirty-one percent of those actually plan to increase their giving for basic human needs or have added that area to their grant-making.

The Dallas Foundation has a long history of giving to organizations that meet critical human needs such as food, shelter, medical care and childcare. But the lagging economy means that many of these agencies are facing unexpected financial strains. The Dallas Foundation is able to help these nonprofits because of the generosity of donor Lyda Hill, who gave \$1 million last fall to establish the Safety Net Fund.

Her gift gave the Foundation an incentive to raise even more resources

for struggling agencies. The Board of Governors set a goal of raising an additional \$1 million for the fund, and by June, gifts from more than 80 donors, former governors, advisory council members and foundations totaled \$789,700. The largest single gift, after Ms. Hill's, came in May: a \$200,000 check from the Bank of America Foundation.

"During this unprecedented economic environment, Bank of America's strategy of providing meaningful and relevant support to the communities we serve has never been more important," said Richard Holt, president of Bank of America Dallas. "Our focus on neighborhood preservation and stabilization continues to be of primary importance. Our strategic support of the Safety Net Fund enables The Dallas Foundation to provide emergency operating support to help health and human services agencies to keep their core programs up and running during this time of great need."

In addition to helping some agencies survive the economy, Safety Net Fund grants are helping some nonprofits streamline operations so they can serve more local residents. For example, Central Dallas Ministries and Crossroads Community Services received \$200,000 to start an innovative food distribution partnership. More than 18,000 impoverished or low-income households could receive dependable food aid as a result of the collaboration.

"Crossroads has the best food distribution process," said Larry James, CEO of Central Dallas Ministries. "We've got the best way of attracting people. This grant opportunity was the catalyst for a true collaboration. The Dallas Foundation motivated us to form the collaboration."

For information about the Safety Net Fund, please visit dallasfoundation.org or contact Director of Community Philanthropy Laura Smith at 214.741.9898 or lsmith@dallasfoundation.org.



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