

Unite Forever

ENDOWING THE FUTURE OF METROPOLITAN DALLAS

JUNE 2023

**UNITE
FOREVER**

INVESTING IN THE FUTURE
OF METROPOLITAN DALLAS



Foundation
of Metropolitan Dallas

*To our supporters, believers and change-seekers:
Together, we made history.*

By now, the contours of our story are well known. We launched Unite Forever—the first endowment campaign in the history of United Way of Metropolitan Dallas—with the goal of reaching our **\$100 million goal** in 2025 as the apex of our Centennial celebration.

But as a community of change-seekers embracing the Live United movement, we came together in support of the North Texas community to reach our \$100 million goal three years early and then—for good measure—topped this milestone with another \$5 million to create even greater impact for generations to come.

While the outlines of this story are known, the details of the story—the color, characters and commitment that are so unique to North Texas—are what this report is all about.

Inside these pages you'll learn more about the legendary civic leaders who gave us the confidence and support to dream big—and achieve bigger—through the Unite Forever campaign. Legacy leaders like Ruth Sharp Altshuler, Margot Perot, Mary Anne Sammons Cree and Caroline Rose Hunt, who inspired others in service of the community they loved. And we highlight and pay tribute to the many families, next-generation and new United Way supporters who created a legacy that will benefit Dallas and the growing region for decades to come.

You'll also read more about the tremendous impact that your support has enabled United Way of Metropolitan Dallas to make in education, income and health, the building blocks of opportunity that create the potential for every citizen of our region to thrive. And equally important, you'll read more about our collective impact in social innovation, which allows us to invest in new solutions to existing challenges while expanding our community of civic, corporate and philanthropic partners.

Even as we celebrate this achievement and the people who made it happen, it's also important to recognize the seven years of hard work it took to exceed our goals. To our vice chairs and United Way Board and Foundation Board members, and to all of you who believe in United Way and the mission—we thank you. For generations to come, the North Texas community will be the grateful beneficiary of your generosity. We extend our sincere thanks.

Mary Templeton Ed Galante

Mary Templeton and Ed Galante
Unite Forever Campaign Co-chairs



Our Mission: We Change Lives

At United Way of Metropolitan Dallas, we unite the community to create opportunity and access for all North Texans to thrive.

We bring together the corporate, philanthropic, education, civic and nonprofit sectors, as well as the community as a whole, to create meaningful, lasting impact in the areas of education, income and health. Our vision is a North Texas where all students graduate prepared for success in college or on the job, all local families achieve financial stability and all of our neighbors can access the health resources they need to live longer, healthier lives.



About the United Way Foundation

Established in 1999, the United Way Foundation of Metropolitan Dallas provides a permanent source of funding, separate from our annual campaign initiatives, to support the programs and activities of United Way of Metropolitan Dallas.

The United Way Foundation enables donors to invest in the long-term future of United Way of Metropolitan Dallas, which ensures our organization has the funding required to improve access to education, income and health for generations to come.



Thank you to our Campaign Leadership

I continue to be inspired and amazed by the dedication, passion and generosity of our Unite Forever campaign chairs, vice chairs and honorary chairs who led this campaign for seven years. From the earliest days of the campaign, through the uncertainty of the pandemic and to the celebration of an unprecedented achievement—they each had an unwavering focus on achieving an audacious goal. Thanks to their leadership, generations of North Texans will enjoy a more equitable community, greater opportunity and improved access to education, income and health.

Terri West, Chair, United Way Foundation of Metropolitan Dallas Board



“\$100 million was a bold goal for United Way, indeed for any nonprofit organization. Unite Forever is the first endowment campaign for United Way of Dallas and—with the help of our donors, as well as our dedicated leaders and vice chairs—the campaign soared.”

Mary Templeton, Unite Forever Campaign Co-Chair

Ed Galante: Chief Architect of Unite Forever

From the very start, Ed Galante was instrumental to the success of the Unite Forever campaign. He served as co-chair and chief architect of Unite Forever, and early on, he generously invested \$1 million to help seed the campaign. With seemingly endless vision, energy and enthusiasm, he helped United Way and our supporters cross the finish line well ahead of goal and three years ahead of schedule—and he even donated additional funds to match Unite Forever life insurance policies.

Galante has selflessly served in almost every major volunteer leadership role at United Way of Metropolitan Dallas, including on both the United Way and the United Way Foundation boards. We were proud to honor Galante with the J. Erik Jonsson Award—the highest honor bestowed by United Way—in 2022 during our celebration for the close of the campaign.

“Future leaders of United Way of Metropolitan Dallas, volunteers and staff, and generations of North Texans to come will appreciate what this group and this organization has achieved. Most importantly, our community will benefit from the true impact.”

Edward G. Galante, Unite Forever Campaign Co-Chair





Unite Forever Campaign Leadership

CAMPAIGN CO-CHAIRS

Mary Templeton and Ed Galante

HONORARY CO-CHAIRS

Ruth Sharp Altshuler †
 Mary Anne Sammons Cree †
 Lyda Hill
 Sally and Forrest Hoglund
 Caroline Rose Hunt †
 Margaret McDermott †

Liz Minyard
 Margot and Ross † Perot
 Roger Staubach

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 Hal Brierley
 Jim Burke
 Kelly H. Compton
 Jason Downing
 Kristy Faus
 Lynn Fisher
 Curtis M. FitzGerald
 Carol March
 Clint McDonnough
 Ron Parker
 Stan Rabin

Dave Rader
 Carolyn Perot Rathjen
 Julia Sands Cunningham
 Terri West
 Steven Williams

United Way Foundation Board of Directors

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 Texas Instruments Foundation

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 (Immediate Past Chair)
 Ernst & Young LLP (EY) (Retired)

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 McDermott-Templeton
 President and CEO,
 United Way of Metropolitan
 Dallas

Kevin March, *Secretary/
 Treasurer, Investment
 Committee Chair*
 Texas Instruments (Retired)

Jim Burke
 Vistra Corp.

David Cabrales
 Foley & Lardner, LLP

Pete Chilian
 J.P. Morgan Private Bank

Thomas Codd
 Axxess

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 Community Volunteer

Jason Downing
 Deloitte LLP

Curtis M. FitzGerald
 Exxon Mobil (Retired)

Pat Faubion
 Comerica (Retired)

Barry Fromberg
 HNI Healthcare

David Brown
 Loncar Lyon Jenkins

Hal Brierley
 The Brierley Group

Edward G. Galante
 Community Volunteer

Erin George
 The Boston Consulting
 Group (BCG)

Carol Glendenning
 Clark Hill Strasburger PLC

H. Ralph Hawkins
 HKS, Inc. (Retired)

Sally Hoglund
 The Hoglund Foundation

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 Community Volunteer

Ashlee Kleinert
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 Kline Family Interests

Pedro Lerma
 LERMA Agency

William Lively
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 McCullough Mediation

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 BLNelson Group LLC

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 PepsiCo/Frito-Lay, Inc. (Retired)

Michael Peterson
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Stanley A. Rabin
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 (Retired)

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 Frito-Lay, Inc. (Retired)

Carolyn Perot Rathjen
 The Perot Foundation

Philip Ritter
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Debbie Taylor
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Mary Templeton
 Community Volunteer

Debra von Storch
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 Darrow Associates

Steven Williams
 PepsiCo Foods North America

J. Scott Wilson
 KPMG LLP (Retired)

EMERITI DIRECTORS

David W. Biegler
 Southcross Energy Partners L.P.

Becky Bright
 Community Volunteer

Liz Minyard
 Community Volunteer

Erle Nye
 TXU (Retired)

* Current and past board
 members since launch

† Denotes deceased

History of Unite Forever

In 2014, United Way of Metropolitan Dallas and the United Way Foundation of Metropolitan Dallas launched the Unite Forever campaign—the first endowment campaign in the organization’s history—with a goal of raising **\$100 million in 10 years**. The mission was simple and far-reaching: to grow permanent funding for United Way that will provide a more predictable, sustainable and stable future.

A successful campaign would allow our nonprofit to withstand annual economic fluctuations that can impact funding cycles, more frequently invest in strategic partnerships and creative ventures outside of the standard grants process, and fund new and emerging solutions for unseen future challenges.

Unite Forever quickly became a rallying cry for everyone who supported United Way’s mission. **In May 2022, we celebrated closing the \$100 million Unite Forever campaign three years earlier than planned.**

United Way’s endowment already provides more than **\$2.5 million** annually to strategic community initiatives, benefiting more than **1.5 million North Texans** every year through life-changing programs and services. The fund is poised to one day yield more than **\$5 million** in annual earnings, at which point it will become the largest annual funding source for continuing United Way’s work—forever.



Scan to read the full history of the Unite Forever campaign.



On United Way’s 90th anniversary, we kicked off the Unite Forever campaign with co-chairs Ruth Sharp Altshuler, Ed Galante and Roger Staubach.



The Ruth Sharp Altshuler Basic Needs Fund was named in honor of one of United Way’s most dedicated beneficiaries.



In January 2020, United Way of Metropolitan Dallas renamed its Downtown Dallas headquarters the Mary Anne Sammons Cree Building in honor of one of our most committed longtime supporters.



In 2017, the Women of Tocqueville launched the Fund for Women and Children, an endowment fund at the United Way Foundation of Metropolitan Dallas.



The family of Caroline Rose Hunt made a lead \$5 million gift in honor of their grandmother’s longstanding support of United Way and its Foundation.



In 2016, Mary Templeton and the late Margaret McDermott teamed up for the naming rights to the top executive position at United Way of Metropolitan Dallas. The McDermott-Templeton chief executive will serve the North Texas community forever more.



The Dallas Morning News highlights the success of the campaign.



Diane and Hal Brierley made a \$5 million gift to the campaign early on, then added a \$500,000 capstone gift to provide matching funds for Unite Forever life insurance policies, giving other United Way supporters an opportunity to double their giving.



After contributing \$1 million at the beginning of the campaign, Margot Perot generously dedicated an additional \$2 million capstone gift to help us cross the finish line victorious.



In May 2022, we once again gathered to celebrate closing the campaign three years ahead of schedule and ahead of goal.



Remembering Ruth Sharp Altshuler

Legendary civic leader and United Way devotee Ruth Sharp Altshuler co-chaired the **Unite Forever Campaign** with Ed Galante and Roger Staubach, prior to her passing in 2017. Altshuler founded the **United Way Tocqueville Society in 1986**, was the recipient of United Way's J. Erik Jonsson Award in 1989 and will forever more be one of the honorary Chairs. She is an honorary lifetime board member.



Ruth's Impact

In recognition of Altshuler's unwavering commitment to ensure that critical assistance remains available for the most vulnerable populations in our community, she became the namesake of the **Ruth Sharp Altshuler Basic Needs Fund**, a portion of the endowment that ensures United Way can continue to respond to the needs of families through a regular and predictable funding stream year after year. Since its inception, the fund has distributed **\$913,167** and enabled **22** of our community impact partners to support North Texans' most fundamental needs, including emergency shelter and food access. The Ruth Sharp Altshuler Basic Needs Fund "friends of Ruth" fundraising efforts were led by Kelly H. Compton, Caren Prothro and Carolyn Perot Rathjen.



“ The Unite Forever campaign was created to help make certain that United Way can continue to provide consistent funding for critical programs and respond to urgent community needs.”

Kelly H. Compton, Unite Forever Vice Chair

12
food pantries
supported

9.4+
million pounds
of food distributed

99,000
North Texans
served

Ruth Sharp Altshuler Basic Needs Fund Contributors

\$1 MILLION AND ABOVE

CAROLYN AND DAVID MILLER
SAMMYE AND MIKE MYERS

MARGOT AND ROSS + PEROT
DR. BOB AND JEAN SMITH FOUNDATION

\$100,000 - \$999,999

Kelly H. Compton
Peggy Dear
The Robert Dedman Family Foundation
Hamon Charitable Foundation

Lyda Hill
Sarah and Alan Losinger
The Eugene McDermott Foundation
Valerie and Lewis McMahan

Caren Prothro
Carolyn and Karl Rathjen
Deedie Rose
Jennifer and Ed Sampson

Marianne and Roger Staubach
Mary and Richard Templeton
Dee Collins Torbert †

\$10,000 - \$99,999

President and Mrs. George W. Bush
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Linda and Bill Custard
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Louise Eiseman †

Louise Griffeth
Regen Horchow
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Joan and Irvin Levy
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Nancy Perot

Sarah and Ross Perot, Jr.
Katherine and Eric Reeves
Lizzie and Dan Routman
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Gay and Bill Solomon
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\$100 - \$9,999

Liz and Bill Armstrong
Marilyn Augur
Jeanne Whitman Bobbitt and
Rhodes Bobbitt
Rebecca Wolfson Bruder
Brent Christopher
Jeanne and Berry Cox
Mary Anne Sammons Cree †

Betsy and Bennett Cullum
Rebecca Fletcher
Judy and Jim Gibbs
Margo and Bill Goodwin
Nancy and Jeremy Halbreich
Jan and Fred Hegi
Susan Hoff
Caroline Rose Hunt †

Kathryn F. Hyland
Caren and Pete Kline
Paul and Linda Ludden
Julie Macatee
Nancy Cain Marcus
Sara and David Martineau
Janie McGarr
Ruth Ann Montgomery

Joan and Robert † Pollock
Gigi Potter-Salley
Marcia Regan Shannon
Helen Storey
Bonnie and Doug Thompson
University of Texas Southwestern
Medical Center
Barbara † and Don Zale

† Denotes deceased

Margot Perot's Capstone Gift

The Perot family is extremely important to United Way of Metropolitan Dallas and to the success of the Unite Forever Campaign. Margot Perot was one of the first donors to courier a **\$1 million check to support Unite Forever to Ruth Sharp Altshuler.**

Margot has served as a Tocqueville chair and as a founding member of the Tocqueville Society since 1986, and she and her late husband, Ross Sr., are also honorary campaign co-chairs. Her family continues the tradition of giving as daughter, Carolyn Perot Rathjen, serves on our United Way Foundation Board.

Moreover, Margot Perot contributed an additional **\$2 million** capstone gift to help close the campaign—an incredibly generous investment that helped enable us to meet and exceed our \$100 million goal three years ahead of our original deadline.



Spotlight on Campaign Co-Chair Mary Templeton

Rich and Mary Templeton have a long history of supporting United Way Dallas with their time and resources. In 2013, Rich led the annual United Way Campaign, and in 2018-19, he and Mary co-chaired the annual campaign together—the first couple to do so. That year, the two helped raise more than \$61 million to improve education, income and health in our community.

The couple was instrumental in the success of the Unite Forever endowment campaign. Mary Templeton took over as co-chair of the campaign when her good friend, Ruth Sharp Altshuler, passed away in 2017. **“It is an honor to be chosen to serve in this role,” she said. “It was something Ruth believed in and to be able to complete what she started is really special.”**

The Templeton family was one of the largest contributors to the campaign. Toward the end of the initiative—in the true spirit of Texas Instruments’ tradition and commitment to United Way—the Templetons teamed up with United Way Foundation Chair and chair of the Texas Instruments Foundation, Terri West, to rally a group of those affectionately known as “TI-ers.” These dedicated supporters joined forces to commit the remaining funds needed to reach the endowment goal.

“The leverage that the endowment will give United Way to address community impact funding is a legacy that I hope is continued not only by this Campaign, but the next one,” explained Mary Templeton. “We hope that by having a generous, well-endowed United Way others will take notice, trust the organization and give, too. I am so grateful to all who have supported the Unite Forever Campaign.”



Scan to read the full story.

The McDermott-Templeton CEO Naming Opportunity

Mary Templeton and the late Margaret McDermott, widow of TI co-founder Eugene McDermott, teamed up to invest in the naming rights for the top executive position at United Way of Metropolitan Dallas in 2016. Two **\$1 million gifts** from both Templetons and the Eugene McDermott Foundation endowed the McDermott-Templeton president and CEO designation at United Way Metropolitan Dallas—the position currently held by Jennifer Sampson. At the time, it was one of the largest contributions to the Unite Forever campaign.



“Rich and I were so very happy to make that gift,” Templeton said. “We are humbled to have our names connected to the McDermotts. Margaret was an inspiration and one of the main reasons why our family is passionate about United Way Dallas and the work it does.”

An Enduring Family Legacy

In the early days of the Unite Forever Campaign, leadership gifts from prominent local philanthropists helped the effort take root and flourish.

In 2015, 19 grandchildren of Caroline Rose Hunt, daughter of the legendary wildcatter H.L. Hunt, made a lead \$5 million gift in honor of their grandmother's longstanding support of the United Way and its foundation. It was the largest gift to the campaign at the time.

"Our grandmother has been an extraordinary example of volunteerism and hard work," said Haven Sands Heinrichs, trustee of The Rosewood Foundation. "To show our family's love and appreciation for all she has done for United Way and the community, we [made] this legacy gift in her honor."

Caroline Rose Hunt, who established The Rosewood Corporation, was involved with United Way for more than five decades, starting as a young UT graduate. Prior to her passing in 2018, she served in myriad leadership roles with United Way, including co-chair of the Tocqueville Giving Society, honorary vice-chair of the United Way Foundation and honorary Unite Forever chair. In recognition of her leadership, United Way presented her with our organization's most prestigious honor, the J. Erik Jonsson Award, in 2003.

Today, Hunt's legacy continues as granddaughter Julia Sands Cunningham serves as a Unite Forever vice chair and granddaughter Lauren Rose Sands is a member of the March Tocqueville Fellows.

The Rosewood Foundation Director, Lynn Fisher, also volunteers for United Way as a Unite Forever vice chair and on the Women of Tocqueville Fund Advisory Council.



The Mary Anne Sammons Cree Building

Mary Anne Sammons Cree, a longtime United Way supporter and benefactor, and her family pledged a \$10 million gift to the Unite Forever campaign in 2020. To honor the entire Cree family, United Way named its Downtown Dallas headquarters The Mary Anne Sammons Cree Building. At the time, the donation was the largest contribution to the campaign.

The family of Mary Anne Sammons Cree has a long-standing history of supporting United Way. Her mother, Rosine Smith Sammons, provided the first pro-bono public relations services for the Community Chest before it became United Way. She also went door-to-door soliciting funds for the organization, and Mary Anne often accompanied her. In 2018, Cree contributed \$1 million to the Unite Forever campaign to honor Rosine and served on the board of directors for our foundation. Through the decades, the family's support of United Way has provided countless resources to the community.

"Mary Anne Sammons Cree enriched the lives of generations of North Texans through her generous support of United Way of Metropolitan Dallas," said Jennifer Sampson, McDermott-Templeton President and CEO, United Way of Metropolitan Dallas.

"Having my name on this building will forever associate me with an organization that has always meant so much to me and my family," Cree said in 2020. "Something special happens when we as a community come together, united in a common goal. I'm incredibly honored by my family's donation to a cause strengthening education, income and health, creating a brighter future for Dallas."



The Women of Tocqueville Fund for Women and Children

In 2017, the Women of Tocqueville launched the Women of Tocqueville Fund for Women and Children, an endowment fund at the United Way Foundation of Metropolitan Dallas with a goal of providing targeted financial and skill-based investments in the areas of education, income and health for North Texas women and children.

“This marks the first-ever Women of Tocqueville-led fund at any United Way in the country,” said fund co-founder Kristy Faus. “As WOT members, empowering women and children are the pillars of our organization and are at the center of all we do.”

“During the pandemic, we had an opportunity to sit back, think and try to imagine what things were going to be like on the other side of it—who would be most hurt that we might partner with when the pandemic was over,” said fund co-founder Carol March. “We felt it was important that the fund lift up other women and elevate our purpose.”

The fund, which has raised more than **\$15 million**, will be a source of permanent support and provide annual distributions for programs that create opportunity and access for women and children to thrive.

INVESTMENTS TO DATE

LiftFund Women’s Business Center - 2021: With a **\$50,000** investment from the Women of Tocqueville, and a **\$50,000** match from Comerica Bank, LiftFund will provide microloans to female entrepreneurs in Southern Dallas so they can successfully grow their small businesses.

The United Way Social Innovation Incubator - 2022: The fund invested \$75,000 in this innovative program, which supports early-stage social ventures led and staffed by women and people of color who are working to implement new solutions in the areas of education, income and health.



Advisory Council

The Women of Tocqueville Fund established the Women of Tocqueville Fund Advisory Council in 2020 to provide strategic direction, leadership and oversight for gift distributions.

MEMBERS

Robbi Luxbacher – Chair
Millie Bradley
Kristy Faus
Lynn Fisher
Nancy LaVerde

Carol March
Cassandra McKinney
Neena Newberry
Pamela Osborne
Tyler Riddell

Jerome Rose
Deb SoRelle
Linda Yohe
Rachel Ybarra



Thank you to our Women of Tocqueville Fund Founding Members

Founding members have contributed \$250,000 or more to the Fund for Women and Children.

Tanya and Shane Allen
Mandy and Kyle Austin
Ellen and Alan Barker
Lisa J. Bottle
Millie and Allan Bradley
Mandy and Jonathan Bradley
Robin Bray and David Kis
Dee M. Brown
Laura and Jason Downing
Kristy and Raymond Faus

Deborah and Robb Gibbins
Cecily and Scott Gooch
Jessica and Bart Hamlin
Michelle and Matt Horton
Scarlet Landry
Nancy and Steve LaVerde
Roberta Luxbacher and Steve Alaniz
Cynthia Malone
Carol and Kevin March
Gail McDonald and Jeffrey Murphy

Cassandra and Bill McKinney
Natalia and Jason Mundo
Neena Newberry
Pamela Osborne
The Riddell Family
Katie and Jerome Rose
The Rosewood Foundation
Jennifer and Ed Sampson
Jan and Mike Sharry
Deb SoRelle and Brian Lindley

Debra and Paul Tagg
Karen Tavana
Debbie and Marshall Taylor
Michelle and Major Thomas
Debra and Ken von Storch
Margaret and Chad Windham
Linda Yohe
Rachel Ybarra

Unite Forever Donors

\$10,000,000 AND ABOVE

Mary Anne Sammons Cree †
The Family of Mary Anne Cree

\$7,500,000 AND ABOVE

Richard and Mary Templeton Foundation
Mary and Rich Templeton Family
Stephanie and Matt Boggs
Allie and Jim Templeton
Katie and John Templeton

\$5,000,000 AND ABOVE

Diane and Hal Brierley
Caroline Rose Hunt † /
The Rosewood Foundation
The Family of Caroline Rose Hunt
The Grandchildren of
Caroline Rose Hunt
Bailey Harrison
Caroline Harrison
Hassie Harrison
Laurie Sands Harrison
Haven and Travis Heinrichs
Lydia and Nick McCutchen
Helen and Bowmer Sands
Lacy and Clayton Sands
Lindy and Jacob Sands
Julia Sands Cunningham
Lauren Rose Sands
Sandi and Lowell Sands

Kristy and Patrick Sands
Peyton Sands
Ryan Faulconer Sands
Gemma and Stark Sands
Marcy and Steve Sands
Leigh and Storm Sands
Laura and Wilson Sands
Joan † and Marvin Lane

\$1,000,000 AND ABOVE

Anonymous Donors (4)
Sara and Gary Ahr
Troy Aikman
Marti and Jim Burke
Laura and Jason Downing
Karen and Tom Falk
Kristy and Raymond Faus
Cathie and Ed Galante and the
Galante Family
Cecily and Scott Gooch
Lyda Hill
Sally and Forrest Hoglund
Estate of Keith Perry Holder
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William Leven
Carol and Kevin March
The Eugene McDermott Foundation
Margaret McDermott †
Mary McDermott Cook
Grace Cook

Carolyn and David Miller
Brandy and Bill Morrison
Sammye and Mike Myers
Margot and Ross † Perot
Barbara † and Stan Rabin
Rachel and Mark Rohr
Jennifer and Ed Sampson
Dr. Bob and Jean Smith Foundation
Marty and Myles Kelley
Sally Smith Mashburn
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Robert West
Bill Womble
Deb SoRelle and Brian Lindley
Michele and John Stephens
Bunny † and CJ † Thomsen
Terri and Mike West
Meili West
Raelynn Mendez

TOCQUEVILLE LEGACY CIRCLE

\$500,000 - \$999,000

Anonymous Donor
Millie and Allan Bradley
Mandy and Jonathan Bradley
The Robert Dedman Family
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Beth and Greg Delagi
Susie and Curt FitzGerald
Erin and Ken George

Hoblitzelle Foundation
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Arlene and Louis Navias
Debbie and Dave Rader
Katie and Jerome Rose
Karen Tavana
Texas Instruments Foundation
Debra and Ken von Storch

TOCQUEVILLE LEGACY CIRCLE

\$250,000 - \$499,000

Anonymous Donor
Tanya Allen
Ruth Sharp † and Kenneth Z. †
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Ellen and Alan Barker
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Lisa J. Bottle
Robin Bray and David Kis
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Robbi Luxbacher and Steve Alaniz
Cyndy Malone and Ron Benke
Cassandra and Bill McKinney
Gail McDonald and Jeffrey Murphy
Valerie and Lewis McMahan
Natalia and Jason Mundo
Neena Newberry
Pamela Osborne
Caren Prothro
Carolyn and Karl Rathjen
The Riddell Family
Robin and Peter Sefzik
Charles Stanton Sharp, Jr.
Jan V. Sharry
George A. † and Nancy P. Shutt
Foundation
Michelle and Major Thomas
Sunny Vanderbeck
Margaret and Chad Windham
Rachel Ybarra
Linda Yohe and Byron Luke

CIRCLE OF FRIENDS

\$50,000 - \$249,999

Anonymous Donor
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Robert and Anabel Bruce Charitable
Foundation
Carole and Rich Fedock
Hamon Charitable Foundation
Susan and Ralph Hawkins
Regen Horchow
Roger Horchow †
Sally Horchow
Colleen O'Connor and Joe Hubach
Ronit and Haviv Ilan
Caren and Pete Kline
Jan and Bob † Madigan
June and Peter McGuire
Alice and Erle Nye
Paula and Ron Parker
Max Post
Reilly Family Foundation
Stephanie and Phil Ritter
Deedie Rose
Lizzie and Dan Routman
Diana and Sam Self
Marianne and Roger Staubach
Phyllis and Ron Steinhart
Debbie and Marshall Taylor
Dee Collins Torbert †

PARTICIPATORY GIFTS

Up to \$49,999

Anonymous Donor
Susie and Steve Anderson
Amye Baker
Bank of Texas
Steven Barany
Scott Baker
Robert K. Baylor
Lee P. Berlin
Carmen and Manuel Berrelez
Alfred L. Booker
Carol and Karl Bovee
Andrew Bowen
Devon and James Bowling
Chris C. Boyd
Christine Bright
Alan Brown
Annette Brown
Pedro Burgos
Cynthia and Gregory Burleigh
President and Mrs. George W. Bush
Eugenia Malpica and Antonio Carrillo
Brent Christopher
Kevin Cleveland
Lisa Ownby and James Clingman III
Maclaine Coles
Richard Howell Collins
Deborah A. Cox
Betsy and Bennett Cullum
Karen and Dan Cullum
Linda and Bill Custard

Debra Lynn Dial
Betsy and Richard Eiseman
Claire and Dwight Emanuelson
The Eulich Family Foundation
Jennifer and Mark Falkenberg
Theresa and Steve Gee
Judy and Jim Gibbs
Margo and Bill Goodwin
Cheryl Goris
Louise and Guy Griffeth
Nancy and Jeremy Halbreich
Karen and Gary Hammer
Michael Hansler
David Harris
Jan and Fred Hegi
Mary and David Henderson
Kristen and Jim Hinton
Susan Hoff
Stephanie House and Susan Dunkel
Michael Howard
Estate of Thomas Hunt †
Kathryn F. Hyland
Mary Jalonick
Gene and Jerry Jones
Keara and Mike Keith
Paul D. Key
Rachel and Kent Kutz
Charlene and Rod Lake
John Lambert
Shaneen Lang
Joan and Irvin † Levy
Christina and Jason Lindwall

Paul Wayne Ludden
Lotty Brodsky-Lyle and Bobby B. Lyle
Estate of Scott Lyons
Nancy Cain Marcus
Christine and David Martin
Sara and David Martineau
Cindy Matthews
Charles Eric McCallum
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Sharon and Mike McCullough
Janie and Cappy McGarr
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Sarah and Ross Perot, Jr.
Karen and Mike Peterson
Joan and Robert † Pollock
Renea and Tim Purtell
Katherine and Eric Reeves
Thomas Roach
Torrence and Yvette Robinson

Jennifer and Alvaro Saenz
E. Jean Savage
Marion R. Scida
Kevin Seawear
Peggy and Carl Sewell
Susanne Shalley
Kris Sheppard
Rachel and Jason Simon
Nicole and Justin Small
Gay and Bill Solomon
Kelly Ann Stafford
Jill Stephenson
Helen Storey
Cary Strohecker
Lui Tai
Brittney Tanner
Deborah B. Toney
Trinity Hunt Partners
Cynthia Trochu
Corinna Ulrich
Sarah Upchurch
Julie Van Haren and David Hensel
Herman and Bernice Waldman
Charitable Trust
Darla and Mark Whitaker
Exa and David Whiteman
Alinda and James Wikert
Jordan and Shan Zaidi
Barbara † and Don Zale

† Denotes deceased

Our Impact: Education

Together, we improve access to education, which has the power to open doors and set students up for a lifetime of success. For North Texas children, a strong educational foundation supports higher incomes and access to health care, so we lead and invest in programs that ensure every student can thrive.

EARLY EDUCATION

Through programs like **Once Upon a Month™**, which delivers free age-appropriate children's books to families every month, we ensure children are set up to succeed in school from an early age.

COLLEGE AND CAREER READINESS

With access to key knowledge, resources and investments like those delivered through **Dollars for College**, North Texas students are equipped to thrive after high school graduation, whether they pursue college or a career.

PARENT EMPOWERMENT

By empowering parents with vital skills and resources, programs like **Healthy Outcomes Through Prevention & Early Support (HOPES)** create a foundation upon which children can thrive.



Our Impact: Income

By supporting financial stability for all North Texans, we can positively impact nearly every part of a person's life, enabling a family to plan for the future, access quality health care and support their children's success in school. We lead and invest in programs that ensure our neighbors can get and keep better jobs, reduce debt and build savings.

WORKFORCE DEVELOPMENT

Programs such as **Pathways to Work** and **Women in Construction** deliver innovative, effective solutions for moving workers into good-paying jobs and building a strong pipeline of skilled employees.

HOUSING STABILITY

Together, we're preventing homelessness and enabling more North Texans to stay in their homes by reducing the instance of evictions, supporting affordable housing, delivering rental and utility assistance, and more.

ECONOMIC MOBILITY

Through initiatives like **Pathways to Economic Mobility**, we provide a variety of resources and services that enable families to increase their savings, improve their credit scores, reduce debt and avoid predatory loans.



Our Impact: Health

Working with our partners and fellow change-seekers, we lead and invest in programs that improve health access for all North Texans. Good health creates a foundation that allows everyone to thrive, affecting everything from how well a child can learn to how much an adult will earn.

EXPANDED HEALTHCARE ACCESS

Through our Healthcare Navigators, the **North Texas Healthcare Collaborative** and other initiatives, we ensure that more of our neighbors have access to high-quality and affordable health insurance.

REDUCED CHILDHOOD HUNGER

Together, we're fighting childhood hunger through the **North Texas Summer & Supper Council** and as part of our Southern Dallas Thrives initiative.

CHILD ABUSE PREVENTION

By matching parents and soon-to-be parents with trained home visitors, the **Texas Home Visiting Program** teaches positive parenting strategies that have been shown to prevent child abuse.



Social Innovation

We embrace social innovation in everything we do. Through the Social Innovation Incubator and Social Innovation Accelerator, we identify and amplify social entrepreneurs with creative new solutions to systemic challenges. With strategic initiatives such as Southern Dallas Thrives, we work closely with corporate partners to identify local challenges and develop bold new solutions that create a measurable impact.

NORTH TEXAS UNITED IMPACT FUND

This partnership with Draper Richards Kaplan Foundation creates lasting change by empowering North Texans to succeed through targeted, for-profit investments. The fund identifies and supports promising early-stage for-profit social enterprises working to drive positive outcomes in education, income and health. Any returns from these discrete social impact investments are recycled into the fund for future investments.



“ United Way of Metropolitan Dallas has developed strategies and technologies that will be models for United Ways around the country as they seek to identify solutions, engage volunteers and reshape the future. Diane and I are proud to be part of the United Forever campaign, and to take this step to perpetuate our support of United Way and its mission to fortify the fabric of this great city for all who live and work here.”

- Hal Brierley, who with his wife Diane made a \$500,000 campaign capstone gift to provide matching funds for United Way Life insurance policies



“ My husband I and gave to the Fund because we knew that it would provide an opportunity for the women of North Texas to change the trajectory of their lives – not only for themselves, but for their families for generations to come.”

- Michelle Thomas, Women of Tocqueville Fund Founding Member



“ My wife and I began supporting United Way annually in the 1970s. Nonprofits, like companies, need to invest in the future, and this is a major investment in the future of United Way and in our community.”

- Stan Rabin, United Way Foundation Board member, who was an early contributor to the Unite Forever Campaign, pictured with his wife, Barbara



View our “Why I Live United” video

A Local Legend's Groundbreaking Investment

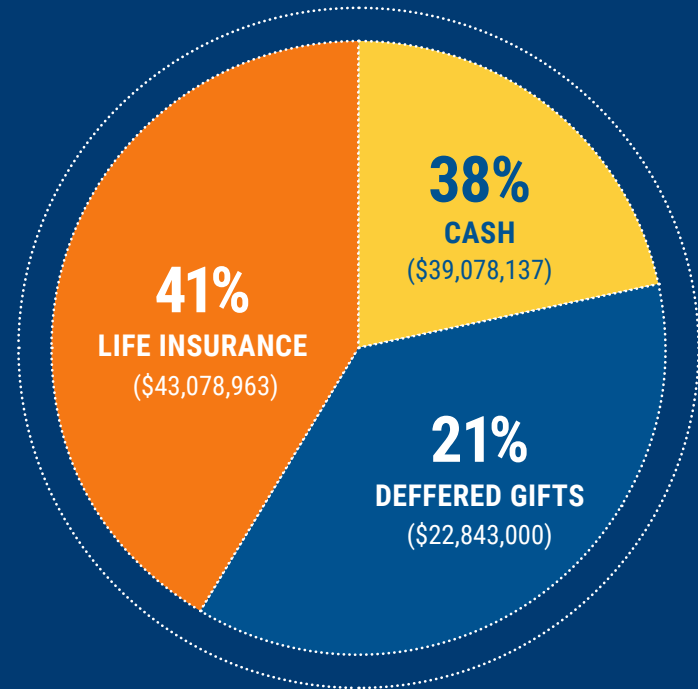
Dallas Cowboys legend Troy Aikman has ties with United Way that date back to his early football days, when he did promotional spots for the national organization. Over the decades, he's become a dedicated supporter of United Way of Metropolitan Dallas, serving on both of our Boards of Directors, co-chairing our 90th Anniversary Celebration alongside Charlotte Jones Anderson, and signing on to be co-chair of the \$25,000 Aikman/Staubach level of the Ruth Sharp Altshuler Tocqueville Society.

But in 2016, Aikman made his most significant contribution to United Way yet: He decided to dissolve the Troy Aikman Foundation for Children—which he had overseen since establishing it in 1992—and transfer its \$1 million in assets to the Unite Forever Campaign. The Troy Aikman Foundation Fund was the first-ever donor-advised fund for United Way of Metropolitan Dallas, which enabled Aikman to make a groundbreaking investment in our community while retaining advisory privileges over the distribution and investment of the assets.

In the years since, Aikman's bold decision has inspired other United Way supporters to establish donor-advised funds. “The world is changing rapidly. And so are we,” said Jennifer Sampson, McDermott-Templeton president and CEO of the United Way of Metropolitan Dallas. “Providing more, and more meaningful, opportunities for donor engagement for social impact is [our] mission. Donor-advised funds are a promising vehicle for us.”



Campaign Financials



\$105 million

in cash and expectancies raised as of May 2022

\$31,850
average gift amount

1,035
total donors

3,328
total gifts

163
gifts above \$100,000

137
gifts above \$250,000

53
endowed Tocqueville gifts (above \$250,000)

\$12,750,551
in United WayLife® life insurance expectancies

\$21,520,589
distributed to United Way of Metropolitan Dallas since 2014

48
gifts above \$1 million

\$15 million
raised through the Women of Tocqueville Fund for Women and Children

42
was the average age of policy holders

\$7 million
raised by the Ruth Sharp Altshuler Fund for Basic Needs

“I’m a firm believer in United Way’s ability to advance meaningful progress in our community, and I’ve seen firsthand the positive impact of their work over the years. The Unite Forever Campaign was an innovative vehicle through which I could invest in United Way and make a broad, holistic impact on North Texas for generations to come. It’s inspiring to be part of an entire movement of generosity that is transforming life for our fellow North Texans.”

- Pedro Lerma, founder and CEO, LERMA/ Agency, and member of the United Way Board of Directors and United Way Foundation Board of Directors



“This investment is a testament to the meaningful impact United Way and its trusted network of community impact partners create. We hope this gift inspires others to join us in advancing United Way’s Aspire United 2030 goals.”

- Carolyn Perot Rathjen, vice president and executive director of The Perot Foundation



“I began my civic career in Dallas as a community volunteer—following the example of my mother, an early United Way volunteer—and I am now delighted to help United Way accelerate its effectiveness as a vital agent for change in the metroplex.”

- Lyda Hill, chairman of Lyda Hill Philanthropies and LH Capital



“I first heard of United Way in 1958 or 1959, around when TI started their employee payroll deduction program. I signed up for it, because I really believe that one needs to give back to the community. About three years ago, my wife was becoming ill, and I thought I should reassess my post-retirement plans. I did a lot of soul searching about what I should do and I developed a plan. In 2019 I revised my will and included a major legacy gift to United Way of Dallas. I Live United to support future generations, because that’s why I’m here: to help.”

- Marv Lane, retired, Texas Instruments, longtime United Way supporter



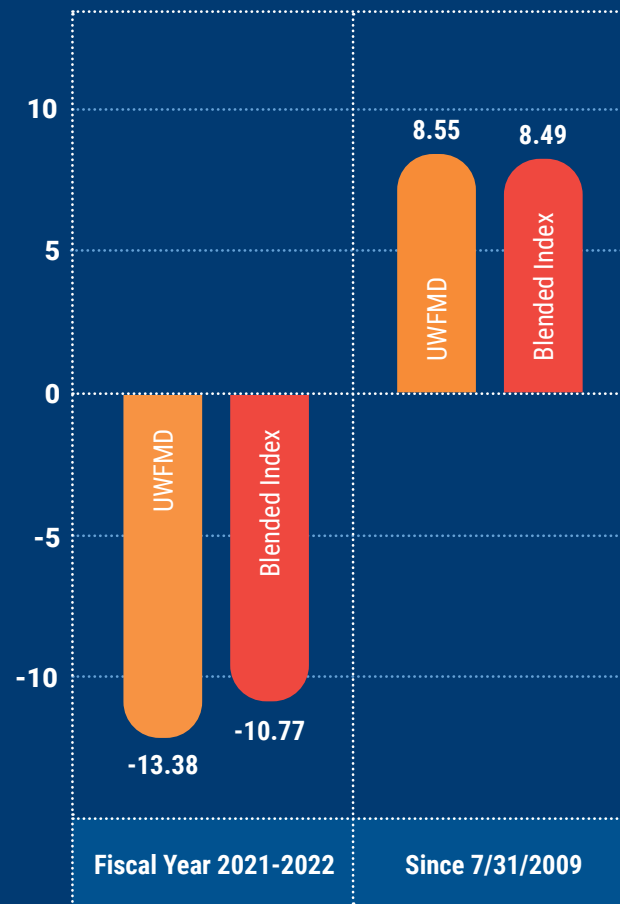
Scan to view the full Unite Forever financials.

2021-2022 Investment Highlights

FUND	Fiscal Year 2021-2022	Since 7/31/2009
UWFMD	-13.38	8.55
Blended Index	-10.77	8.49

ACTIVITY SUMMARY	Fiscal Year 2021-2022	Since 7/31/2009
Beginning Market Value	56,679,078	14,413,006
Contributions	3,399,551	25,760,327
Distributions	(2,668,000)	(21,520,589)
Net Flows	731,551	4,239,738
Interest/Dividend Income	1,169,358	10,766,634
Gains/Losses	(8,836,034)	20,792,439
Total Earnings	(7,666,676)	31,559,073
Fees	(61,323)	(529,187)
Ending Market Value	\$49,682,630	\$49,682,630
Time-weighted Return	-13.38%	8.55%

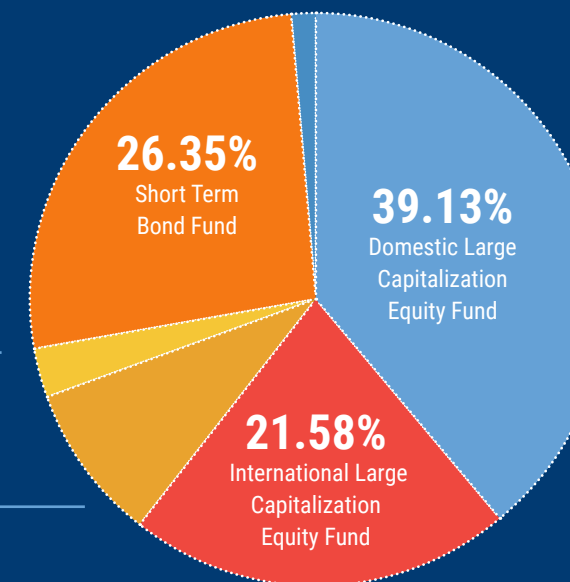
RETURN COMPARED WITH BLENDED INDEX FUND



1.26%
Cash & Equivalents

2.84%
International Emerging
Market Equity Fund

8.85%
Domestic Small/Medium
Capitalization Equity Fund



2021-2022 Portfolio Composition

COMPOSITION	Market Value	% of Total	Policy
Total Fund	\$49,682,630	100%	100%
Domestic Large Capitalization Equity Fund	19,439,440	39.13%	36.00%
International Large Capitalization Equity Fund	10,721,839	21.58%	22.00%
Domestic Small/Medium Capitalization Equity Fund	4,396,848	8.85%	9.00%
International Emerging Market Equity Fund	1,408,716	2.84%	3.00%
Short Term Bond Fund	13,090,787	26.35%	30.00%
Cash & Equivalents	625,000	1.26%	0.00%

A message from our CEO

Thanks to you, **we soared past our ambitious \$100 million Unite Forever Campaign goal** and secured unprecedented support to endow our community impact work in perpetuity.

Your generous investments built our endowment—a full three years ahead of schedule—and will fuel our continued focus on outcomes in education, income and health. Your passionate commitment also established two important funds for building a stronger Dallas: one focused on creating opportunity for women and children and the other on basic needs and emergency services—a community safety net for the unexpected.

When these \$100 million investments are fully secured, the endowment will spin off \$4.5 million or more as it grows each year. Forever.

Absolutely essential to our success has been the galvanizing and forward-looking leadership of our United Way Board, led most recently by Charlene Lake and now by Stephen Williams, and our United Way Foundation Board, led by Terri West. We are also so grateful for our fabulous Unite Forever Co-Chairs Mary Templeton and Ed Galante and their team of highly committed vice-chairs, whose support energized us to do what many thought was impossible.

Yes, we have accomplished much together. And we applaud you, our community, for your outpouring of generosity, support and demonstrated belief in our strategic vision to Unite Forever.

On your shoulders, we now stand poised to look to the future. And as we march toward our second century of service and Centennial anniversary in 2025, we walk hand-in-hand with you to achieve our Aspire United 2030 community impact goals so all North Texans have opportunities to thrive.

These are historic moments for United Way Dallas and our Foundation. And you are an integral part of this rich history. Together we will build a better future for our children and their children to live, work and raise families in North Texas—this cherished community we call home.

Yes, your United Way stands strong. Yes, we aspire to do more. And together, we will.



Jennifer Sampson
McDermott-Templeton President & CEO



LIVE UNITED

As United Way of Metropolitan Dallas enters our next century of service to the North Texas community, we invite you to join us and continue the Live United movement, forever. If you would like more information on remembering United Way in your estate, please contact

Susan Hutcheson,
Vice President, Leadership Giving, at shutcheson@unitedwaydallas.org



Learn more about **legacy giving**.

**UNITE
FOREVER**

INVESTING IN THE FUTURE
OF METROPOLITAN DALLAS

