

CONCEPT AUDIT



The Regional Economic Alliance

June 5, 2008



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BACKGROUND

In January of 2004, GNO, Inc. was borne out of Metrovision and the Greater New Orleans Chamber of Commerce. The primary motivation was years of disjointed economic development efforts among regional stakeholders coupled with the need to coordinate a more strategic regional economic development course for Southeastern Louisiana. By forming GNO, Inc., the leadership within the ten parish region intended to create a coherent regional effort in order to land significant economic development projects and capital investment. To that end, GNO, Inc., a public private partnership, was launched and a five year fundraising campaign ensued which was predicated on a 5 year benchmark goal of GNO, Inc. of creating and/or retaining 30,000 jobs by year end 2008.

GNO, Inc.'s funding model was designed as a public-private partnership (501 c3) that incorporates investors and attempts to engage political and business leaders among all 10 parishes within the region. Due to a myriad of factors (which will be detailed herein), skepticism of success ran high from the outset and confidence of GNO, Inc. began to deteriorate almost immediately. This was evidenced by erosion in the funding base while some regional partners questioned the involvement of GNO, Inc. as it pertains to the 30,000 job goal benchmark. The sudden intrusion of Katrina in the summer of 2005 created unfathomable challenges for the region and GNO, Inc. These challenges offered an unprecedented opportunity for the leadership of GNO, Inc. to reassess its program of work and relevancy in the post Katrina era, which literally changed the entire Gulf Coast region overnight.

A number of threshold questions and issues have been raised:

- Is GNO, Inc. providing value to its public and private sector partners throughout the region?

- Is GNO, Inc. doing all it can to engage investors throughout the region in strategies and tactics and keep investors informed of and involved in GNO, Inc. activities?

- > Is the GNO, Inc. roadmap for economic development focused on appropriate priorities?

- > What will it take to re-instate higher levels of investment for GNO, Inc. in order to implement its proposed programming?

These questions as well as others were asked of 67 private and public sector leaders, representing 62 entities throughout the ten parish GNO, Inc. service territory by Resource Development Group, Inc. (RDG). RDG is a Columbus, Ohio based economic development consulting firm which was retained by GNO, Inc. to help formulate funding strategies for the future. RDG's work was completed during March, April and May of 2008 and the results of their process are contained herein.

ASSIGNMENT

Resource Development Group (RDG) was retained by GNO, Inc. for the following purpose:

- 1) Conduct a minimum of 50 leadership interviews to:
- 2) Determine the depth of understanding and commitment to GNO Inc.'s current and proposed programming and Economic Development agenda.
- 3) Test funding potential for a three to five year funding cycle beginning in 2009. Analyze GNO, Inc.'s present investor base to determine the potential of this group for increased, future financial support, while testing a funding goal of \$2.7 million annually from unencumbered investment (both public and private sectors).
- 4) Identify new prospects for GNO, Inc., both in terms of the upcoming funding initiative, as well as for longer term cultivation for future engagement.
- 5) Identify the potential leadership for a funding campaign.
- 6) Define the elements of a possible funding campaign including strategy, timing and approach.
- 7) Investigate the potential for drawing support from philanthropic funding sources.

The results of this Concept Audit are summarized herein.

METHODOLOGY

Resource Development Group used the following four step process to conduct the Concept Audit:

Step 1

In order to complete the aforementioned assignment, Resource Development Group drew upon its unique industry perspective and exclusive experience evaluating, designing, and implementing economic development programs and funding strategies in over 100 small, mid, and large sized markets. Our expertise in conducting concept audits and designing responsive and individualized revenue-generation strategies has resulted in more than \$500 million in operational capital raised on behalf of our clients, who include chambers of commerce, economic development corporations, and other public, private, and public-private organizations focused on promoting civic health and economic development.

Step 2

Background and contextual information on organizational development, governance, financial history, and previous funding methods was provided by the staff and board leadership of GNO, Inc.

Step 3

Individual interviews were conducted with 67 strategically identified public and private sector leaders throughout the ten parish GNO, Inc. service area. Representatives were chosen from a wide variety of industry sectors, and included community leaders from 61 small, medium, and large businesses, community-based organizations, and governmental entities in order to secure a broad spectrum of opinions and analysis on the current and future economic environment in Southeast Louisiana.

Step 4

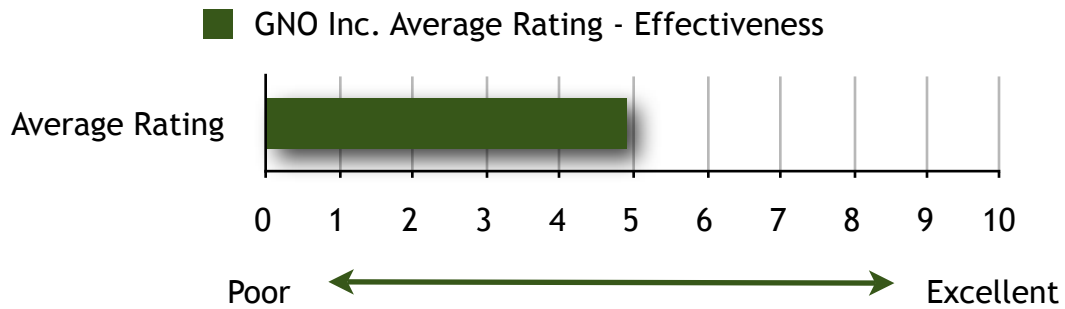
The Board of directors of GNO, Inc. will be presented with the aggregated results and full analysis of the 62 Concept Audit interviews, as well as recommended action items to address any organizational issues impacting planned future funding activities.

KEY FINDINGS

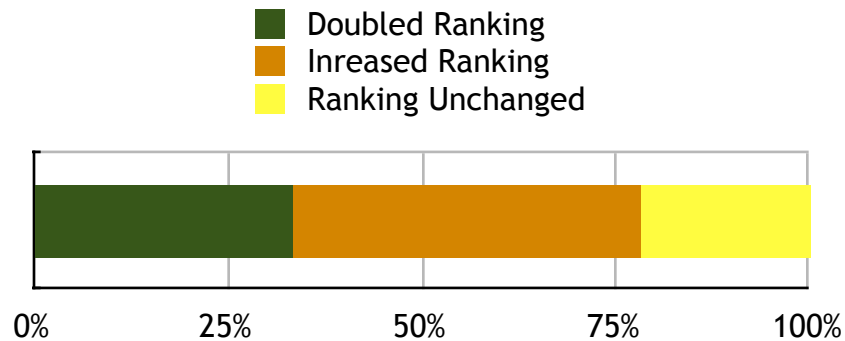
The following analysis reflects the aggregated responses of the 67 concept audit participants representing 62 organizations throughout the ten parish GNO, Inc. service area.

I. GNO, INC.'S RATINGS AND EFFECTIVENESS

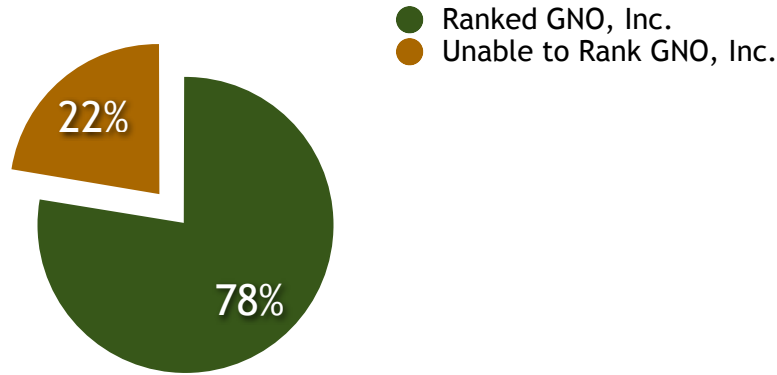
Those interviewed for this Concept Audit were asked to rank GNO, Inc.'s effectiveness over the past 3 years utilizing a scale of 1 (poor) to 10 (excellent). The average ranking assigned to GNO Inc. was 4.93 out of 10.



Although there is room for improvement, 17, or 33% of those individual respondents doubled their score for GNO, Inc. since Katrina. Furthermore, another 45% of respondents increased their rankings of GNO, Inc. since Katrina devastated the region. Hence, 78% of respondents improved their rankings of the organization pre versus post Katrina. These statistics clearly indicate that feelings are strong that the organization is improving and moving in the right direction.



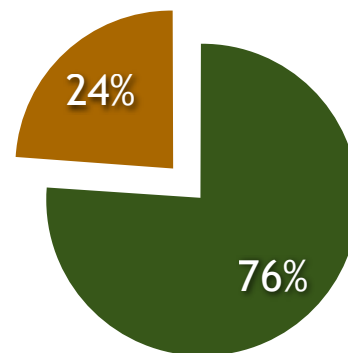
It is important to note that not everyone interviewed for the concept audit was able to rank the effectiveness of GNO, Inc. Of those individuals interviewed, 52 of 67 individuals did rank GNO, Inc.'s performance.



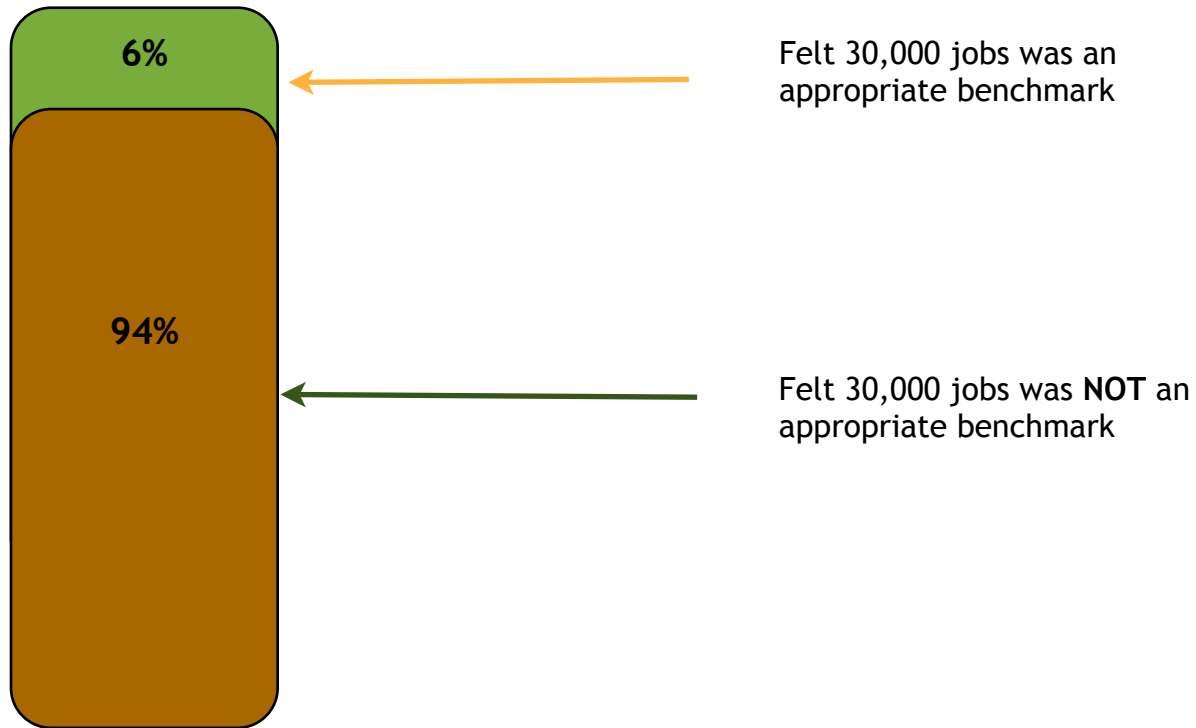
Of the 22% not able to rank the organization, **ALL** had one common denominator, the lack of knowledge of GNO, Inc.'s accomplishments and current activities. When asked to explain this further, a lack of communication about GNO, Inc.'s programming, and clarity of the organization was cited as a reason those interviewees could not rank GNO, Inc.'s effectiveness.

Being the last benchmark ranking GNO, Inc., participants were asked about whether they are or were aware of the job creation and retention goal from 2004. This goal stated GNO, Inc. would lead efforts in creating or retaining 30,000 jobs within the ten parish region by year end 2008.

- Participants Aware of 30,000 Job Goal
- Participants Unaware of 30,000 Job Goal



Do you think that the benchmark of creating or retaining 30,000 jobs is relevant today in the post Katrina environment?



“GNO, Inc. is moving in the right direction, we have an appreciation of the focus, but need to talk about deliverables and how to accomplish these with regional support.”

“The ranking was helped because GNO, Inc. is effective in public policy.”

“I can’t rank the performance of the organization because I have little knowledge on what they are doing, and I have invested since 2004”

“The prior benchmark of 30,000 jobs was never a good measure of success, thus I only give GNO, Inc. a mediocre ranking. I am happy they recognize change is needed and are moving in a new direction.”

“GNO, Inc. is getting better, historically there has been little trust of them on the north shore.”

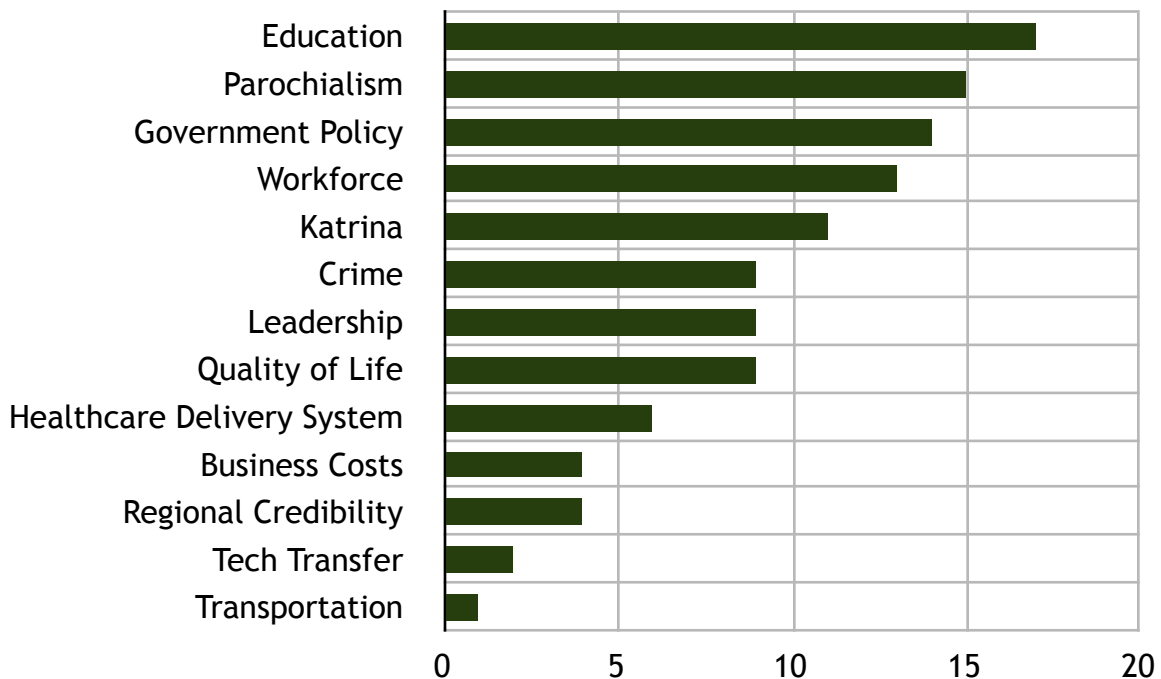
“I think GNO, Inc. is too conforming and this fact dilutes its effectiveness.”

II. REGIONAL ISSUE IDENTIFICATION

In order to develop accurate recommendations in framing the region's capacity to fund and support economic development programs, as well as to set realistic expectations for benchmarks moving forward, it is an important component of the GNO, Inc. Concept Audit to incorporate participants thoughts gauging the regions opportunities and challenges. This is particularly critical in the post Katrina environment. One respondent captured this phenomena by stating the New Orleans region "is a giant petri dish" referring to the regions current unprecedented environment. Interviewees were asked what they felt were their top regional impediments to growth as well as open ended questioning which probed for additional feedback pertaining to regional opportunities.

A myriad of top level issues as well as subsets of those issues were brought up during the interviews. The following table represents specific data pertaining to **ALL** responses by issue. Although some of the issues mirror those of the Roadmap for Economic Development, they are not discussed in the same context (as an emphasis of programming for GNO, Inc. which will be discussed in the next section).

Concept Audit response: Regional Issue Identification



Regional issues could commonly be classified as foundational in nature. At the top level, education was deemed most critical. Interviewees indicated that education drove indirect and induced negative impacts such as workforce challenges, crime, and a broken healthcare delivery system which all contributed to a diminished quality of life. Government policies which include tax and fiscal impacts and the political environment coupled with the specific issue of parochialism throughout the region was also articulated as a significant regional challenge impacting growth.

Concept Audit participants also stated that the impact of hurricane Katrina has resulted and acted as a catalyst for change within the region and as such has created indirect and induced positive impacts, including more business conducive government policy, less parochialism, and educational reform. Taken in this context during the Concept Audit, interviewees stated Katrina has forced change and enabled the region to move quicker to resolve foundational issues.

Discussion pertaining to the current national economy was not tracked or solicited, however, participants who did mention this felt that the ten parish region was faring much better than the U.S. as a whole. The reasons articulated for assertion included the following:

- > Lack of a sub-prime problem in the regions residential sector.
- > 100,000 unfilled jobs statewide - historically low unemployment in the region.
- > Billions of dollars of federal monies starting to flow into the region for infrastructure remediation.
- > Booming oil, energy, and chemical industries - currently over \$100 billion in new capital investment underway.
- > Renewed interest in New Orleans from young professionals who are seeking a vested stake in rebuilding the region.
- > Recovering tourism and convention business combined with global awareness of the region.
- > Liquidity in the capital markets within the region.

Taken as a whole, the perceived state of the regional economy, influx of capital investment, as well as consensus to remediate major foundational issues is a significant opportunity for GNO, Inc.'s integration and implementation of its *Roadmap for Economic Development*.

“Post Katrina New Orleans is a difficult place to live and work.”

“Education is the key issue, this feeds crime, indigent health care demands, lack of workforce, etc.”

“Parochial ideology and animosity directed towards New Orleans is a challenge.”

“Quality of life issues are important and the region must work together to make a difference.”

“Challenge for community is to get business and government in alignment - this is critical for any region to be successful.”

“Education and quality of life, particularly on being able to attract workforce.”

“Education drives everything, and we finally have the framework in place at the state level to begin changing this, for example, the charter school movement.”

“Lack of ethics in government are a problem.”

“Louisiana is not competitive from a tax and fiscal standpoint, particularly as it relates to our surrounding states.”

“The region can be an example of a great American renaissance - a national example of how to respond to disaster.”

“Katrina was a catalyst for change.”

III. GNO, INC.'S ROADMAP FOR ECONOMIC DEVELOPMENT PROGRAM PRIORITIES

Over 90% of those participating in the Concept Audit are in favor of the program priorities as defined in the Angelou Economics *GNO, Inc. Roadmap for Economic Development*. The Roadmap articulates three areas of focus and four targeted industries that are deemed most relevant and impactful in a post Katrina environment.

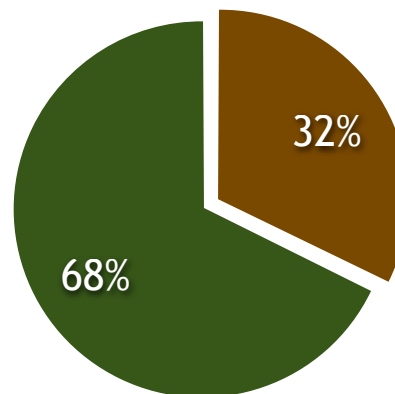


The three legged graphic above represents a visual picture of how the major areas of regional efforts and focus were framed in our discussions. The graphic shown above was either already familiar to, or explained to every person participating in the Concept Audit. Interviewees understood the relationship of the legs of the stool and their dependance on one another for support.

Of those interviewed, over 90% agreed that, “someone” must take ownership of these regional issues; workforce, public policy and business development/marketing. To that end, the concepts presented in the pre-case document were deemed a solid worthwhile investment and focus for GNO, Inc.

Concept Audit participants ability to rank Roadmap for Economic Development priorities:

- Unable to Rank Priorities
- Ranked Priorities



The inability of participants to rank program priorities of the *Roadmap* was NOT an indictment of their validity, but due to the fact ALL interviewees felt they were equally important and too dependent on one another to separate. While there was universal acknowledgement that all three focus areas are important, those 68% of participants able to rank *Roadmap* priorities felt workforce development was the top priority, followed by public policy and business development / marketing.

GNO, Inc. Roadmap for Economic Development Area of Focus Priority Rankings			
<i>Area of Focus</i>	<i>Priority 1</i>	<i>Priority 2</i>	<i>Priority 3</i>
Workforce	26	9	5
Public Policy	6	20	12
Business Development / Marketing	9	9	19

In addition to the feedback ranking program priorities of the *Roadmap for Economic Development*, some participants offered suggestions as additional roles for GNO, Inc. to further enhance the regions economic viability. These suggestions were however, offered extemporaneously by respondents with no specific prompt from the interviewer. A total of 23 programming suggestions were offered by participants. The top four included business retention and expansion, biomedical / healthcare programming, international programming and entrepreneurial programs. It is

important to note that no suggestion merited more than 7 responses of the 67 people interviewed.

“The roadmap makes sense. The biggest challenge will be implementing this by building a coalition of support on the regional level especially recognizing the cultural differences within the region.”

“Program priorities make sense.”

“The road map will take us where we need to go - convey that message.”

“In favor of the road map and am very encouraged volunteers are engaged in the process.”

“Need to marry this to the state plan.”

“GNO, INC. is strategic in its approach for the first time. If anything gets accomplished, this will be a monumental outcome.”

“The target markets and Angelou are correct, but we must strengthen business retention and expansion.”

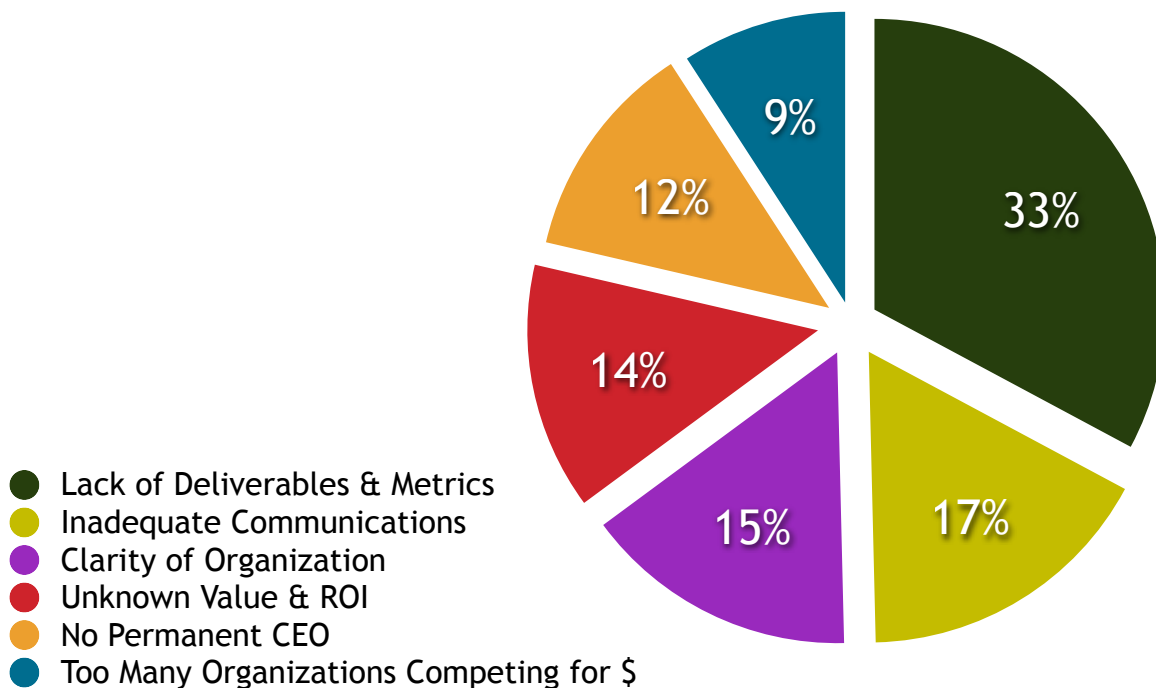
“Execution of the plan is of paramount importance.”

“GNO, Inc. needs to be recognized as the go to organization and deliver specific results related to the Roadmap.”

IV. GNO, INC.’S CAMPAIGN CHALLENGES

When asked to identify possible challenges to an investment campaign, numerous issues were raised in detail and were couched in the context of moving the organization forward. A remarkable consensus emerged indicating interviewees are willing to concede that although there have been issues and challenges with GNO, Inc.’s performance and lack of results (pre Katrina), people are willing to extend the organization another chance. In fact, 70% of participants mentioned this in an unsolicited fashion during the interview process. While this consensus and sentiment is a tremendous opportunity for GNO, Inc., it is equally clear that the organizations’ performance must improve.

Concept Audit participants issues impacting GNO, Inc.'s proposed fundraising campaign:



While not minimizing the issues deemed significant by participants of the Concept Audit, it is important to note that the vast majority of interviewees indicated they were optimistic that GNO, Inc. would survive and flourish due to strong board leadership and engagement. Furthermore, perceived instability in the CEO position was partially resolved with the retention of Michael Hecht, although the critical importance of the GNO, Inc. Board leadership “rallying” around the new CEO must be noted. GNO, Inc.’s “track record” in the CEO position is not universally applauded; hence, the need for Board leadership to be vocally and outwardly supportive of the new CEO is crucial during this important time of organizational transition.

“Unless there is a CEO on board, there is nothing to talk about.”

“Leadership and communication is critical for GNO, Inc. to survive.”

“GNO, Inc. has always failed at communications, that must be fixed.”

“There are too many organizations and its hard to figure GNO, Inc. out from the rest.”

“I have invested in GNO, Inc. since 2004 and I do not see any value - I don’t know what they have done.”

“Less talk and more action is critical.”

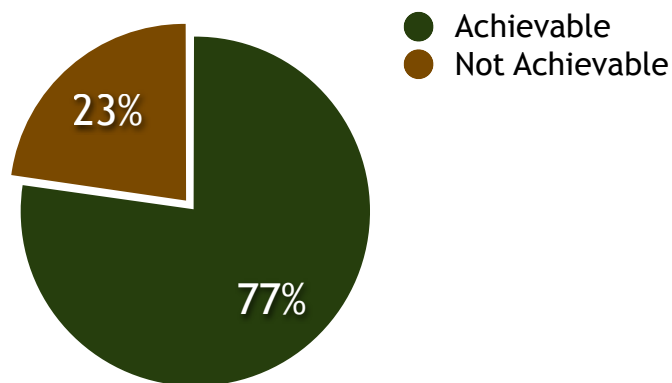
“GNO, Inc. needs to be results driven.”

“GNO, Inc. must be aggressive in messaging for a campaign. Timing is good now, but the competition for dollars is great, they must show ROI.”

“There are a lot of organizations and the base is less now than pre Katrina.”

V. FUNDING

RDG tested an increase of 50% per year in new unencumbered monies for GNO, Inc. Currently, GNO, Inc. receives approximately \$1.51 million per year from corporate and government sources, not including state of Louisiana as well as grant and foundation monies. The following represents the collective comfort level with this target goal:



“Goal is aggressive and will be difficult to achieve.”

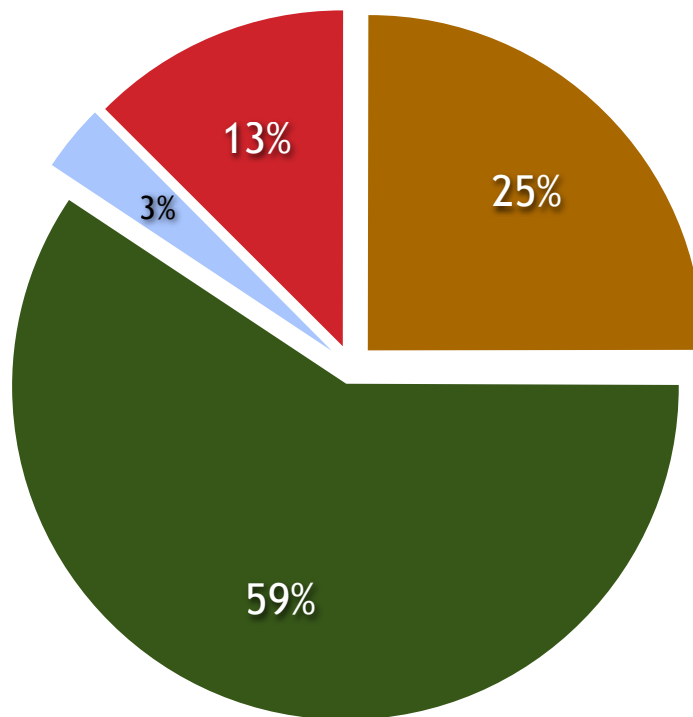
“The increase is doable.”

“The increase is attainable, but will not be easy.”

“You will need to bring many more smaller businesses in the mix to achieve that goal because there are fewer large businesses here now.”

Concept Audit participants preference for the future funding cycle:

- No Preference
- 3 Year Cycle
- 4 Year Cycle
- 5 Year Cycle



“3 year cycle makes sense, this will be a forced landmark for accountability.”

“A 3 year cycle is long enough to get some wins.”

“I think a 5 year cycle is good as anything shorter may not work and GNO, Inc. must have the funds to implement the plan effectively.”

The majority of private sector interviewees are willing to make a multi-year commitment to GNO, Inc. In fact, 82% were willing to do so and most preferred a three year cycle. The public sector cannot commit to a multi-year program as budget requests must be submitted for annual review and approval by elected bodies.

RECOMMENDATIONS

Resource Development Group offers the following recommendations in the critical areas of organizational development, communications and community relations, investor relations, and metrics to improve organizational capacity, increase performance and efficiency, critically involve volunteer leadership, and improve awareness and understanding of GNO, Inc.

ORGANIZATIONAL DEVELOPMENT

As additional investors and organizations are integrated into and with GNO, Inc., it is important that managing the increased number of investors, partners, stakeholders, and other constituencies take place. Building the capacity of GNO, Inc. to maintain, monitor, track and manage these relationships over time will be critically important especially as regional collaboration evolves. This will enable GNO, Inc. to determine quantifiable impacts of relationships and multipliers while also allowing groups to quickly mobilize in response to issues of mutual interest and impact.

RDG recommends GNO, Inc. utilize contact management tools (i.e. ACT or similar) in order to manage and track regional relationships and contacts with investors (in addition to investor relations below).

COMMUNICATIONS AND COMMUNITY OUTREACH

Data gleaned through the concept audit indicated that role clarity between and among GNO, Inc., local EDO's, the media and the general public is not evident across the ten parish region. This is a particular challenge for GNO, Inc. as it stands to be impacted the most financially by lack of mission and role clarity among potential funders. Hence, GNO, Inc. and its partners should seek to elevate the importance of economic development and articulate regional enhancement activities and strategies by proactively communicating with the media. Any specific strategy should employ both traditional media methods as well as leveraging key messaging through volunteers, elected officials, multipliers, etc. GNO, Inc. must promote itself stressing it is an action oriented, effective, and efficient organization. Some recommendations employed in this area include:

- > Identify appropriate media and communications outlets within the region.
- > Cultivate and work to constantly improve relationships with appropriate media outlets, PR firms, agencies, etc.

- > Develop innovative programs, such as hosted roundtables, lunches, etc. to involve media allies to assist and help enhance the organizations and partners goals, mission, vision, etc.
- > Maximize shared opportunities with other organizations who have similar communication and outreach needs.
- > Communicate successes and outcomes relative to GNO, Inc. and appropriate partner accomplishments

INVESTOR RELATIONS

Investor relations are a crucial component of any effective economic development organization and funding strategy. A systematic and pro-active approach to communicating with the investor base will have a direct and positive impact on the retention of investors. In addition, RDG recommends a thorough review of GNO, Inc.'s By-Laws in an effort to update and respond to the unique and unprecedented challenges and opportunities in the region.

It is imperative that a senior staff person(s) manage the development, coordination and implementation of a pro-active and consistent system of investor involvement and communications. The Investor Relations function can and should be integrated with the overall communications and community outreach strategies.

Overall, GNO, Inc. needs to continue to create ways to communicate the value proposition, successes and activities to both those investing in the organization and prospective investors throughout the region. Feedback from interviewees found no consistent, systematic process for communicating with investors and potential investors on a regular basis. It is our belief that some of the financial attrition since Katrina is at least partially attributable to the lack of a pro-active system of investor communications.

Some specific recommended investor relations strategies include:

- > Conduct annual one-on-one meetings with investors to update them on GNO, Inc. progress and proactively address any issues or concerns.
- > Produce investor specific materials such as e-mail updates, and other compelling and insightful communications non-investors would not be privy to.
- > As appropriate and relevant, provide access to proprietary data sources and tools.

- > Allow access to investor only events such as VIP meet & greets, receptions, etc.
- > Conduct roundtables and investor only events in order to share information, leads and access to leaders from throughout the region.

METRICS

Since 94% of Concept Audit participants felt the 30,000 job goal was not relevant in the post Katrina environment, RDG recommends new metrics and benchmarks be formulated and implemented. It is important to recognize that metrics will be a key foundation for the communications and messaging elements of the funding campaign and in implementing the GNO, Inc. *Roadmap for Economic Development*.

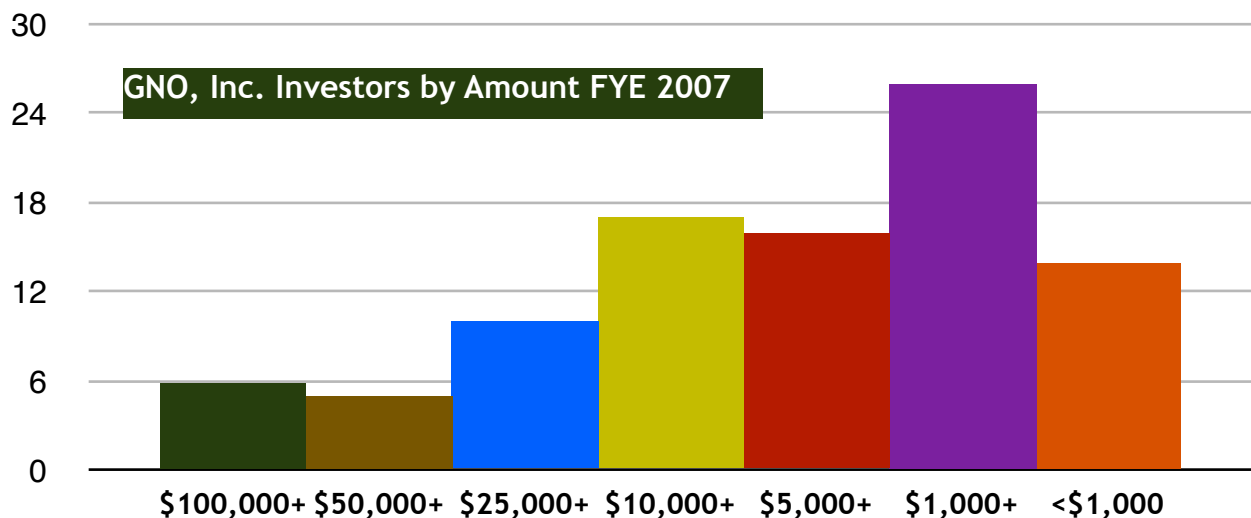
Upon reviewing the initial recommendations of the *Angelou Target Industry Report*, the Concept Audit interviews, as well as input from the GNO, Inc. alignment session, we are recommending the following top level metrics. Taken in proper context, these metrics are deemed to be both beneficial to the internal structure of GNO, Inc. as well as to positively impact the clarity, effectiveness, strength, and focus of the organization.

- > Implement, measure, and strengthen internal and externally focused communications strategies initiated by GNO, Inc.
- > Pursue improvement in foundations that support the political and regional influence of GNO, Inc.
- > Continuously enhance both the financial and non-financial value proposition of GNO, Inc. to partners, stakeholders, and appropriate constituencies.
- > Coordinate the integration and enhancement of workforce development programs demanded by the specific industry targets (as identified in the *Angelou Roadmap for Economic Development*), as well as others deemed critical to advancing the regional economy.
- > Work to strengthen the regional economy landscape through traditional core economic development functions.

FUNDING POTENTIAL

When determining the campaign goal for an organization that has an established funding history, it is crucial to first examine the current demography of the base. The following charts show the current penetration of investment in GNO, Inc. by industry sectors, as well as investment level categories.

	% By Number of Investors	% Funding By Investor		% By Number of Investors	% Funding By Investor
Accounting	7.9 %	1.4 %	Insurance	2.9 %	.05%
Architects/Engineers	1.9 %	.13 %	Investment Firms	1.9 %	.09%
Attorneys	9.9 %	6.5 %	Manufacturing	6.9 %	6.0%
Automotive	0 %	0 %	Media	0.9 %	.01%
Banking	12.9 %	19.8 %	Miscellaneous	0.9 %	1.3%
Business Services	0 %	0 %	Real Estate	7.9 %	1.5%
Business Supplier	0 %	0 %	Real Estate (Developers)	0 %	0 %
Construction Supply	0 %	0 %	Real Estate (Realtors)	0 %	0 %
Consulting	0.9 %	.04 %	Retail	0.9 %	.01%
Contractors / General	2.9 %	1.6 %	Technology	1.9 %	.07%
Contractors / Specialty	0 %	0 %	Trade Groups/Associations	3.9 %	1.6 %
Distributors	2.9 %	.3 %	Transportation	0 %	0 %
Economic Development	0 %	0 %	Utilities	1.9 %	11.4%
Education	3.9 %	1.3 %	Wholesaler	0 %	0 %
Employment Agencies	0 %	0 %			
Environmental	7.9 %	8.6 %	Total	100 %	100 %
Foundations	1.9 %	.09 %			
Government	7.9 %	29.2 %			
Health Care	4.9 %	3.0 %			
Home Builders	0 %	0 %			
Hospitality	0.9 %	4.8 %			
Hotels/Motels	1.9 %	1.5 %			
Information Technology	0 %	0 %			



The previous charts clearly indicate if specific industries are investing in GNO, Inc. as well as what the volume of investment is evidenced by those financially supporting the organization.

Since GNO, Inc. has a history of funding support, understanding the base for potential shifts in support is very important. As such, 48 current investors participated in the Concept Audit. The top investors of a given organization typically track very consistently from one funding effort to the next. Coupled with the one-on-one interviews conducted during the Concept Audit, we are able to establish a goal that is both aggressive and attainable.

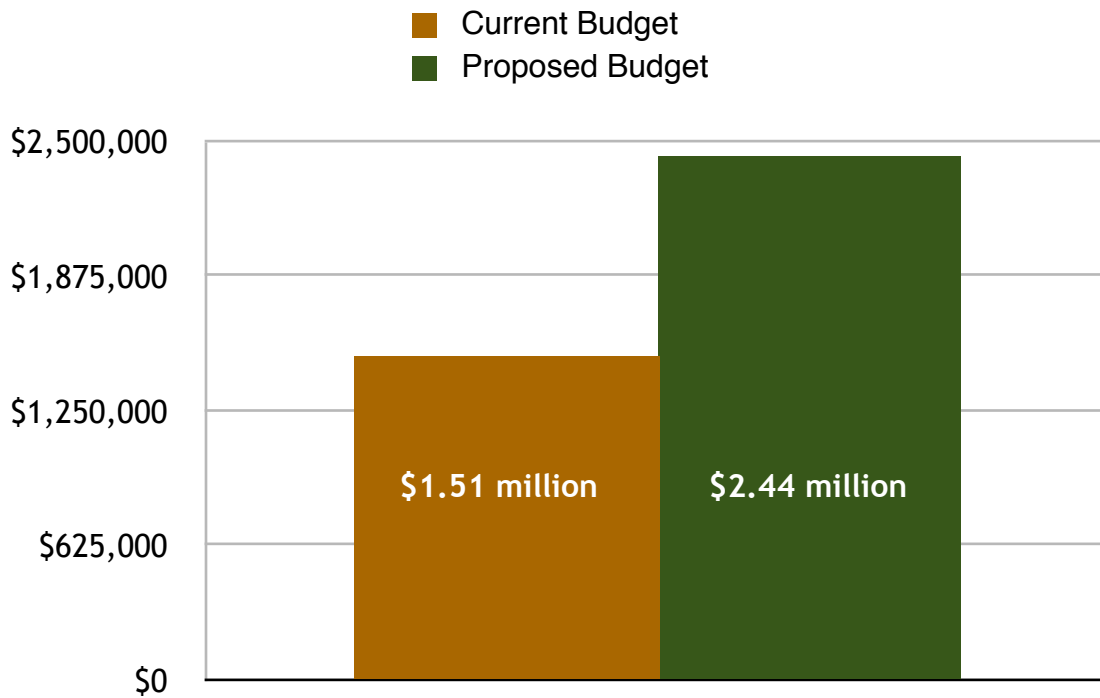
All 48 of GNO, Inc.'s existing investors that participated in the Concept Audit indicated that they were planning on continuing their financial support of the organization in some manner. 26 indicated they anticipated maintaining their current level of support, while 14 suggested a propensity to increase their investment level in accordance with a multi-year campaign effort, though on average this incremental increase would not exceed an additional 7%. This group thus represents potential funding increases of \$106,500 annually in operational support. Conversely, 3 participants indicated that there was a propensity to decrease their investment level beginning next year. This potential decrease represents 3% of the current funding stream or \$31,000. The net gain of the analysis indicates that the potential to grow from the current investor base will be \$75,500 or a 6% increase.

Of the remaining 14 non-investors interviewed during the course of the Concept Audit, 10 indicated interest to invest in GNO, Inc. Specifically, these potential 10 new investors represent an additional \$250,000 or a 21% increase in funding over current investment levels. The remaining 4 expressed a high propensity to decline an investment opportunity in GNO, Inc. Of those who indicated they were likely to decline, all cited economic conditions and lack of internal support within their firms as the primary reason they would not support GNO, Inc.

The 48 existing investors interviewed provide \$1.18 million per year of the current \$1.51 million, or 78.25% of the current annual budget for GNO, Inc. It is important to note that the base budget pre-Katrina was \$2.4 million. Thus, given the input received during the Concept Audit, RDG recommends a minimum target goal of an additional \$850,000 annually, which would bring the operational budget (not including state encumbered grant and foundation monies) to \$2.44 million annually, a total three-year target of \$7.32 million. The minimum target goal represents a 57% increase in funding over FYE 2007 monies.

In order to accomplish this goal, significant base broadening must take place as the current top funders of GNO,inc. will remain flat in terms of future investment for the organization. It is critically important to engage new investors and participants from all parishes and continue to build on regional attributes. We would be remiss not to strongly suggest that all board members of GNO, Inc. invest in the organization.

Proposed GNO, Inc. Operating Budget 2009-2011:



The following table indicates the application of our goal setting methodology:

Investor Category	Current Annual Investment	Projected Annual Investment	Projected Three-Year Investment
\$50,000 + interviewed	\$975,000	\$1,020,000	\$3,060,000
\$50,000 + not interviewed	\$80,000	\$80,000	\$240,000
\$20,000 + interviewed	\$160,000	\$210,000	\$630,000
\$20,000 + not interviewed	\$91,250	\$101,250	\$303,750
Less than \$20,000 interviewed	\$85,250	\$102,600	\$307,800
Less than \$20,000 not interviewed	\$126,680	\$179,000	\$537,000
Non investors interviewed	-----	\$250,000	\$750,000
Base Broadening	-----	\$500,000	\$1,500,000
Total	\$1,518,180	\$2,442,850	\$7,328,550

Based on RDG's funding formula and GNO, Inc.'s historical funding data, RDG believes modest revenue enhancement can be generated from existing investors. We feel strongly that based upon our 14 non-investor interviews, significant base-broadening opportunities exist. RDG has identified over 500 companies that we consider good prospects for investment in GNO, Inc's future efforts based on size and business sector. Furthermore, GNO, Inc. has the ability to leverage private philanthropic dollars if pursued in a systematic and pro-active fashion.

Campaign Recommendations and Target Funding Goal

Given the current time constraints and trajectory new leadership, initiatives and regional interest, Resource Development Group recommends the immediate implementation of a regional public/private funding campaign to generate operating revenue on behalf of GNO, Inc. We suggest a combined public/private minimum campaign goal of \$7.5 million over three years, which represents \$2,500,000 in program funding annually beginning in 2009 through 2011. This would signify an aggregate gain of approximately \$850,000 in additional revenue annually, plus cover the costs of implementing the investment campaign and possible pledge attrition over the three year cycle. This goal is aggressive and will only be attainable if the core investor base is significantly broadened across multiple sectors while the current funding structure is maintained and enhanced.

RDG also conducted a broad screening of philanthropic foundations in order to identify possible outside funding sources. No potential revenue from philanthropic foundations was factored into the setting of the above target funding goal, but there are available opportunities for funding partnerships with foundations that must not be overlooked and should be investigated as part of any funding initiative. Appendix E contains a detailed listing of foundations that have been identified as promising funding partners because of an expressed interest in community and/or economic development, geographic focus, or mission.

Based on our assessment interviews, program analysis, and examination of funding feasibility, coupled with the critical need to identify pledges by year-end 2008, RDG recommends a combination of direct solicitation, and targeted CEO exposure, combined with effective utilization of board leadership to mobilize current and new investors while allowing GNO, Inc. staff to continue their full-time economic development activities. In short, we must be able to complete a number of critical, time-sensitive tasks, with limited staff capability. Thus, efficiency and maximization of available human resources is crucial.

Also, the new leader of the organization will have a direct impact on the program and how it is perceived by both investors and non-investors. Essentially, investors are “buying” the leader of GNO, Inc. RDG feels it will be advantageous for the new CEO to be “front and center” in the fundraising process. It is also important that EVERY member of the GNO, Inc. board have a vested financial investment in the organization.

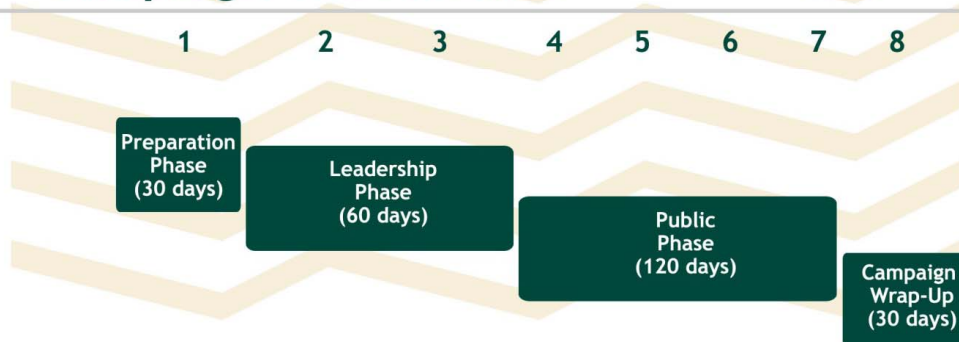
Our recommendation is that RDG coordinate and manage most aspects of the campaign effort. The following issues must be addressed by the appropriate staff, boards, and organizational leadership prior to launching any funding campaign:

1. Final confirmation of current and future budget allocations.
2. Identification of campaign leadership structure, co-chairs, and council.
3. Roles and responsibilities of Campaign and Board leaders in the campaign.
4. Reconciliation of past investments.

Campaign Timeline



Campaign Timetable



f u n d i n g y o u r v i s i o n

APPENDIX A : CONCEPT AUDIT PARTICIPANTS

Company	Name	Sector
Acadian Ambulance Service	Mr. Steven Kuiper	Health Care
Adams and Reese, LLP	Mr. Mark Spansel	Attorney's
AT&T	Mr. Bill Oliver	Utilities
Baker, Donelson, Bearman, Caldwell & Berkowitz, PC	Mr. Danny Shaw	Attorney's
Baptist Community Ministries	Mr. Byron Harrell	Foundation
Barrier Construction Co., LLC	Mr. George Wilson	Construction
Boeing Company	Mr. Ken Tucker	Manufacturing
Boh Bros.	Mr. Robert Boh	Construction
Bollinger Shipyards, Inc.	Mr. Boysie Bollinger	Manufacturing
Blue Cross Blue Shield of Louisiana	Mr. Gery Barry	Insurance
Capital One	Mr. Steven Hemperly	Banking
ChevronTexaco	Brent Wood	Energy / Environmental
Cox Communications	Mr. Brad Gundmeyer Ms. Susan Silbert	Utilities
Daigle Fisse & Kessenich	Mr. Howard Daigle	Attorney's
DCL Mooring & Rigging	Mr. Peter Kazunas	Transportation

Company	Name	Sector
Delgado Community College	Ms. Debbie Lea Ms. Larissa Littleton-Steib	Education
DonahueFavret Contractors, Inc.	Ms. Maura Donahue	Construction
East Jefferson General Hospital	Dr. Mark Peters	Health Care
Entergy	Mr. Rod West Ms. Shelly MacNary Mr. Gary Silbert	Utilities
Ernst & Young LLP	Mr. Bob Kimbro	Accounting
Favrot & Shane	Mr. Henry Shane	Architects / Engineers
First NBC Bank	Mr. Ashton Ryan	Banking
Gibbs Construction, LLC	Mr. Robert Wooderson	Construction
Greater New Orleans Foundation	Mr. Ben Johnson	Foundation
HCA Delta Division	Mr. Mark Romig	Insurance
Hilton New Orleans Riverside	Mr. Fred Sawyers Mr. Robert Carpenter	Hospitality
Imperial Trading Company	Mr. John Georges	Distribution
International Matex Tank Terminals	Mr. John Little	Energy / Environmental
Jefferson Chamber of Commerce	Ms. Joan Mollohan Mr. Ray Seamon	Associations
Jefferson Parish Government	Hon. Aaron Broussard Mr. Darryl Ward	Government

Company	Name	Sector
Jones, Walker, Waechter, Poitevent	Mr. Bill Hines	Attorney's
JP Morgan Chase	Mr. John Kallenborn	Banking
Lemle & Kelleher, LLP	Mr. Fred Preis	Attorney's
Lockheed Martin Space Systems Co. - Michoud Operations	Mr. Thomas Fierke	Manufacturing
Louis Armstrong New Orleans International Airport	Mr. Sean Hunter	Transportation
Louisiana, State of	Sec. Stephen Moret	Government
McGlinchey Stafford	Mr. Keith Colvin	Attorney's
Metairie Bank and Trust Co.	Mr. Ric Smith	Banking
Milling, Benson, Woodward, LLP	Ms. Roz Koretsky	Attorney's
New Orleans Business Council	Mr. Jay Lapeyre	Associations
New Orleans Chamber of Commerce	Ms. Sandra Gunner	Associations
New Orleans, City of	Dr. Ed Blakeley	Government
Northrop Grumman Corp. Ship Systems	Mr. Woody Oge	Manufacturing
Ochsner Health System	Dr. Patrick Quinlan	Health Care
Omni Bank	Mr. Jim Hudson	Banking
Pamlab, LLC	Mr. Barry LeBlanc	Pharmaceuticals

Company	Name	Sector
Pan-American Life Insurance Group	Mr. Jose Suquet	Insurance
Patrick F. Taylor Foundation	Ms. Phyllis Taylor	Foundation
Phelps Dunbar, LLP	Mr. John Manard Jr.	Attorney's
Plaquemines Association of Business and Industry	Mr. Dale Benoit	Associations
Regions Bank	Ms. Suzanne Mestayer	Banking
Shell E&P Company	Mr. Frank Glaviano	Energy / Environmental
Southeastern Louisiana University	Mr. Randy Moffett	Education
Stewart Capital, LLC	Mr. Frank Stewart	Financial Services
Stirling Properties	Mr. Marty Mayer	Real Estate
Strategic Comp	Ms. Leslie Jacobs	Insurance
Transoceanic Shipping Co., Inc.	Mr. Greg Rusovich	Transportation
Tulane University	Dr. Scott Cowen	Education
Valero - St. Charles Refinery	Mr. Ron Guillory Ms. Taryn Miller	Energy / Environmental
Waldemar S. Nelson and Company, Inc.	Mr. Charles Nelson	Architects / Engineers
Whitney Bank	Mr. John Turner	Banking
Xavier University of Louisiana	Dr. Norm Francis	Education

APPENDIX B: PHILANTHROPIC FOUNDATION SCREEN

Yvonne & Red Adams Foundation

c/o Brad A. Adams
228 St. Charles Ave., Ste. 814
New Orleans, LA 70130-2619

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$17,776,147; Total giving: \$224,225

EIN: 721283535

990-PF: 2006 2005 2004 2003 2002 2001 **Last Updated:** 10/29/2007

Donor(s)

Byron A. "Red" Adams, Sr., Yvonne B. Adams

Background - Established in 1994 in LA.

Limitations - Applications not accepted. Giving primarily in LA. No grants to individuals.

Purpose and Activities

Giving primarily for religion, particularly Roman Catholic churches, organizations, and schools; funding also for human services.

Fields of Interest Subjects

Catholic agencies & churches; Community/**economic development**; Higher education
Human services; Secondary school/education

Geographic Focus

Louisiana

Application Information

Contributes only to pre-selected organizations.

Officers

Yvonne B. Adams, President and Treasurer; Byron A. "Red" Adams, Sr., Vice President and Secretary

Financial Data Year ended 12/31/06:

Assets: \$17,776,147 (market value); Gifts received: \$15,331,640; Expenditures: \$230,291; Total giving: \$224,225; Qualifying distributions: \$226,930; Giving activities include: \$224,225 for 13 grants (high: \$100,000; low: \$1,000)

Additional Location Information

County: Orleans, Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005:

\$466,585 to Napa Valley Wine Auction, Saint Helena, CA, payable over 1 year.
\$25,000 to Jesuit Retreat House, Los Altos, CA, payable over 1 year.
\$20,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.
\$6,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.
\$5,000 to Cenacle Retreat House, Metairie, LA, payable over 1 year.
\$5,000 to Equestrian Order of the Holy Sepulchre of Jerusalem, payable over 1 year.
\$3,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.
\$3,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.
\$3,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.
\$3,000 to Saint Josephs Church, Millbrook, NY, payable over 1 year.

American Institute for Social Justice, Inc.

1024 Elysian Fields Ave.
New Orleans, LA 70117-8402

Type of Grantmaker: Public charity

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Organization that normally receives a substantial part of its support from a governmental unit or from the general public

Financial Data (yr. ended 12/31/06): Assets: \$7,455,658; Total giving: \$6,659,145

EIN: 237108110

990: 2006 2005 2004 2003 2002 2001, **Last Updated:** 3/20/2008

Limitations - Giving primarily in New Orleans, LA.

Purpose and Activities

The institute seeks to promote community organization and leadership development.

Fields of Interest Subjects

Community/**economic development**; Leadership development

Geographic Focus

Louisiana

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Larry Rogers,* President; Pat House,* Secretary; James Butler,* Treasurer; Carolyn Carr, Executive Director; Jack Lavey; James Lynch

Financial Data Year ended 12/31/06:

Revenue: \$8,841,563, Assets: \$7,455,658 (market value); Gifts received: \$8,309,808; Expenditures: \$8,583,732; Total giving: \$6,659,145; Program services expenses: \$8,389,170; Giving activities include: \$6,659,145 for 3 grants (high: \$4,952,288)

Additional Location Information

County: Orleans

Metropolitan area: New Orleans-Metairie-Kenner, LA

The Azby Fund

650 Poydras St., Ste. 2521

New Orleans, LA 70130-6191

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$19,165,940; Total giving: \$1,034,982

EIN: 726049781

990-PF: 2006 2005 2004 2003 2002 2001 **Last Updated:** 8/8/2007

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name.

Marion W. Harvey‡, Herbert J. Harvey, Jr.‡, Erminia Wadsworth‡

Background

Established in 1969 in LA.

Limitations

Applications not accepted. Giving primarily in New Orleans, LA.
No grants to individuals.

Purpose and Activities

Giving primarily for education; community/**economic development**; botanical gardens; youth services, and Roman Catholic churches and organizations; funding also for the arts, and historic preservation.

Fields of Interest Subjects

Arts, Botanical gardens, Catholic agencies & churches, Children/youth, services
Community/**economic development**, Education, Elementary/secondary education
Foundations (community), Health organizations, Higher education, Historic
preservation/historical societies, Museums (art)

Geographic Focus

Louisiana

Application Information

Contributes only to pre-selected organizations.

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Ann Fitzmorris, President; Stewart Farnet,* Vice President; Thomas B. Lemann,* Secretary-Treasurer; Michael Liebaert,* Executive Director; Samuel S. Farnet, Jr., Patrick Wadsworth Fitzmorris

Memberships Affinity Groups

Association of Small Foundations

Financial Data Year ended 12/31/06:

Assets: \$19,165,940 (market value); Expenditures: \$1,631,666; Total giving: \$1,034,982; Qualifying distributions: \$1,106,649; Giving activities include: \$1,034,982 for 59 grants (high: \$448,067; low: \$1,000)

Additional Location Information

County: Orleans

Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005:

\$692,808 to New Orleans City Park, New Orleans, LA, payable over 1 year.

\$145,000 to New Orleans Museum of Art, New Orleans, LA, payable over 1 year.

\$98,834 to Friends of City Park, New Orleans, LA, payable over 1 year.

\$67,589 to River Road Historical Society, Destrehan, LA, payable over 1 year.

\$61,010 to New Orleans Botanical Garden Foundation, New Orleans, LA, payable over 1 year.

\$29,500 to Mount Carmel Academy, New Orleans, LA, payable over 1 year.

\$17,000 to De La Salle High School, New Orleans, LA, payable over 1 year.

\$15,000 to Arts Council of New Orleans, New Orleans, LA, payable over 1 year.

\$6,000 to Friends of Jefferson the Beautiful, Metairie, LA, payable over 1 year.

\$3,500 to Jesuit High School, New Orleans, LA, payable over 1 year.

Joe W. & Dorothy Dorsett Brown Foundation

c/o The Brown Foundation Center

320 Hammond Hwy., Ste. 500

Metairie, LA 70005-5100

Telephone: (504) 834-3433

Contact: Beth Buscher

URL: www.thebrownfoundation.org

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$137,114,411; Total giving: \$3,854,886

EIN: 726027232

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 2/5/2008

Additional Contact Information

Service Learning Program address: 320 Hammond Hwy., Ste. 502, Metairie, LA 70005;

e-mail for Beth Buscher: BethBuscher@thebrownfoundation.org

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name.

Joe W. Brown‡; Dorothy Dorsett Brown‡

Background

Established in 1959 in LA.

Limitations

Giving limited to southern LA and the New Orleans area, and the Gulf Coast of MS. No support for organizations that are less than 3 years old. No grants to individuals, or for equipment, endowments, building funds, community-wide capital drives, multi-year grants, indirect grants to intermediary institutions, or for grants to offset budget mandated cutbacks.

Purpose and Activities

Giving primarily to fund medical research, housing for the homeless, organizations that care for the sick, hungry or helpless, religious and educational institutions, and organizations and groups that are concerned with improving the foundation's local community.

Program Area(s)

The grantmaker has identified the following area(s) of interest:

Service Learning Program

Service learning is a learn-by-doing approach to the curriculum. Students receive practical hands-on experience in the subject matter studied by meeting identified community needs through active participation. It is a practical way to take classroom learning and apply it in "real world" settings. Specific community needs can be addressed by students interested in making a difference in an intentional way.

Fields of Interest Subjects

Community/**economic development**; Education; Environment, natural resources; Food services; Health care; Homeless; human services; Hospitals (general); Human services; Religion

Population Groups

Homeless

Geographic Focus

Louisiana; Mississippi

Types of Support

Continuing support; General/operating support; Matching/challenge support
Program-related investments/loans; Research;Scholarship funds

Publications

Application guidelines; Grants list

Application Information

The foundation has discontinued awarding scholarships to individuals. Application form and guidelines are available on foundation Web site. All applications must be received at least 3 months before funds are required. Application form required. Applicants should submit the following:

1. Qualifications of key personnel; 2. Copy of IRS Determination Letter
3. Copy of most recent annual report/audited financial statement/990
4. Listing of board of directors, trustees, officers and other key people and their affiliations; Initial approach: Proposal; Copies of proposal: 1; Board meeting date(s):

On Fridays mid-monthly; Deadline(s): Between Jan. 1 and Sept. 30; Final notification: 1-2 months

Officers

D.P. Spencer, President; B.G. Spencer, Vice President; D.B. Spencer, Vice President;
E.K. Hunter, Secretary; B.M. Estopinal, Treasurer

Number of Staff

4 full-time professional; 2 part-time professional

Memberships Affinity Groups

Association of Small Foundations

Financial Data Year ended 12/31/06:

Assets: \$137,114,411 (market value); Expenditures: \$5,408,648; Total giving: \$3,854,886; Qualifying distributions: \$5,729,412; Giving activities include: \$3,226,787 for 108 grants (high: \$800,000; low: \$500; average: \$10,000-\$100,000); \$628,099 for 83 grants to individuals (high: \$10,000; low: \$1,800; average: \$5,000-\$10,000); \$1,442,781 for 5 loans/program-related investments

Additional Location Information

County: Jefferson - Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005:

\$250,000 to Service Learning Action Program, Metairie, LA. For general support, payable over 1 year; \$194,635 to University of New Orleans, New Orleans, LA. For general operating support, payable over 1 year; \$125,000 to Audubon Nature Institute, New Orleans, LA. For Wetlands IMAX, payable over 1 year; \$125,000 to Salvation Army of New Orleans, New Orleans, LA. For serving residents devastated by Katrina, payable over 1 year; \$125,000 to Volunteers of America, New Orleans, LA. For mentally challenged living program, payable over 1 year; \$100,000 to National World War II Museum, New Orleans, LA. For special exhibits gallery, payable over 1 year; \$95,000 to Nature Conservancy, Baton Rouge, LA. For Mississippi River Project, payable over 1 year; \$40,000 to University of Louisiana at Lafayette, Lafayette, LA. For summer program, payable over 1 year; \$30,000 to Catholic Charities Archdiocese of New Orleans, New Orleans, LA. For summer witness program, payable over 1 year; \$30,000 to New Orleans Opera Association, New Orleans, LA. For children's outreach program, payable over 1 year.

Chaparral Foundation

333 Texas St., Ste. 1250
Shreveport, LA 71101-3676

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$2,820,794; Total giving: \$131,975

EIN: 721473570

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 1/13/2008

Donor(s)

Phillips Foundation

Background

Established in 2000 in LA.

Limitations

Applications not accepted. Giving primarily in LA. No grants to individuals.

Fields of Interest Subjects

Animals/wildlife; Christian agencies & churches; Community/**economic development**
Education

Geographic Focus

Louisiana

Application Information

Contributes only to pre-selected organizations.

Trustees

Dewey W. Corley
Virginia M. Corley

Financial Data

Year ended 12/31/06:

Assets: \$2,820,794 (market value); Expenditures: \$229,989; Total giving: \$131,975;
Qualifying distributions: \$227,559; Giving activities include: \$131,975 for 34 grants
(high: \$51,000; low: \$25)

Additional Location Information

County: Caddo; Metropolitan area: Shreveport-Bossier City, LA

Entergy Charitable Foundation

639 Loyola Ave.
New Orleans, LA 70113-3125
Telephone: (877) 285-2006
E-mail: grants@entergy.com
URL: www.entergy.com/our_community/giving.aspx

Type of Grantmaker: Company-sponsored foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$1,670,623; Total giving: \$3,414,117

EIN: 710845366

990-PF: 2006 2005 2004 2003 2002**Last Updated:** 4/17/2008

Donor(s)
Entergy Corp.

Background
Established in 2000 in AR and LA.

Limitations
Giving primarily in areas of company operations in AR, LA, MA, MS, NH, NY, TX, and VT. No support for political organizations, religious organizations not of direct benefit to the entire community, or organizations owned or operated by an employee of Entergy. No grants to individuals, or for utility bills, administrative expenses or recurring expenses exceeding 15 percent of the requested amount, capital campaigns, gala events, testimonials, or fundraising meals, advertisements, or uniforms, equipment, or trips for school-related organizations or amateur sports teams; no loans.

Purpose and Activities
The foundation supports programs designed to create and sustain thriving communities. Special emphasis is directed toward programs designed to promote low-income initiatives and solutions; and education and literacy.

Program Area(s)
The grantmaker has identified the following area(s) of interest:

Education and Literacy
The foundation supports programs designed to promote effective knowledge within the community. Special emphasis is directed toward programs designed to eliminate illiteracy.

Low-Income Initiatives and Solutions
The foundation supports programs designed to provide innovative and measurable ways to positively impact families and their ability to support children and the elderly. Special emphasis is directed toward programs designed to help sustain families and teach self-sufficiency; provide housing; provide technical assistance and training for nonprofits; provide home-ownership preparation services; promote energy management and awareness; and promote alternative sources of energy.

Fields of Interest Subjects

Community/**economic development**; management/technical aid Education; Education, reading; Environment, energy; Family services; Housing/shelter; Human services, financial counseling

Population Groups

Aging; Children; Economically disadvantaged

Geographic Focus

Arkansas; **Louisiana**; Massachusetts; Mississippi; New Hampshire; New York; Texas; Vermont

Types of Support

Program development

Publications

Application guidelines

Application Information

Application form required. Initial approach: Complete online application form
Board meeting date(s): 3 times per year; Deadline(s): Feb. 1, May 1, and Aug. 1

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.*

Curt L. Hebert, Jr.,* Chairperson, Chief Executive Officer, and President; Leo P. Denault, Secretary-Treasurer; Kay Kelley Arnold; Renae E. Conley; Hugh T. McDonald; Richard J. Smith; Gary Taylor

Memberships Associations and Other Philanthropic Organizations

Council on Foundations

Financial Data Year ended 12/31/06:

Assets: \$1,670,623 (market value); Gifts received: \$3,888,990; Expenditures: \$3,418,618; Total giving: \$3,414,117; Qualifying distributions: \$3,418,618; Giving activities include: \$3,414,117 for 176 grants (high: \$363,500; low: \$954)

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005: \$250,000 to Foundation for the Mid South, Jackson, MS. For Mid-South Individual Development Account, payable over 1 Year; \$230,985 to Louisiana Artists Guild, New Orleans, LA. For Louisiana ArtWorks and Economic Development, payable over 1 year; \$115,000 to Urban League of Greater New Orleans, New Orleans, LA. For Urban League Oral Histories Project, payable over 1 year; \$110,000 to Teach for America, Greater New Orleans, New Orleans, LA. For Teach For America in Louisiana, Arkansas, and Mississippi, payable over 1 year; \$75,000 to United Negro College Fund, New Orleans, LA. For Annual Campaign, payable over 1 year; \$60,000 to City Year Little Rock, Little Rock, AR. For Entergy Team Sponsorship, payable over 1 year; \$15,000 to Foundation for Public Broadcasting, Jackson, MS. For Between the Lions research project, payable over 1 Year; \$10,000 to Living History Education Foundation, Buchanan, NY, payable over 1 year; \$8,334 to Junior Achievement of Greater New Orleans, New Orleans, LA, payable over 1 year; \$5,000 to Springfield Family Center, Springfield, VT, payable over 1 year;

Entergy Mississippi, Inc. Corporate Giving Program

(formerly Mississippi Power & Light Company Contributions Program)

P.O. Box 1640

Jackson, MS 39215-1640

Telephone: (601) 969-2348

Contact: Phillip R. Miracle, Dir., Comms.

URL: www.entergy.com/our_community/giving.aspx

Type of Grantmaker: Corporate giving program

Last Updated: 7/31/2007

Limitations

Giving limited to AR, LA, MS, MA, NH, NY, TX, and VT. No support for religious or political organizations, or for amateur sports teams. No grants to individuals, or for capital campaigns.

Purpose and Activities

Entergy Mississippi makes charitable contributions to nonprofit organizations involved with arts and culture, education, health and human services, housing, and economic development. Special emphasis is directed toward programs designed to improve education. Support is limited to areas of company operations.

Fields of Interest Subjects

Arts; **Economic development**; Education; Health care; Housing/shelter; Human services

Geographic Focus

Arkansas; **Louisiana**; Massachusetts; Mississippi; New Hampshire; New York; Texas; Vermont

Types of Support

Annual campaigns; Conferences/seminars; Continuing support; Employee matching gifts; General/operating support; Matching/challenge support; Scholarship funds; Seed money; Sponsorships

Publications

Corporate giving report (including application guidelines)

Application Information

The Economic Development Department handles giving. The company has a staff that only handles contributions. A contributions committee reviews all requests. Application form required. Initial approach: Complete online application form. Board meeting date(s): Varies; Deadline(s): Varies; Final notification: Following review.

Number of Staff

1 full-time professional

Additional Location Information

County: Hinds; Metropolitan area: Jackson, MS

Clifford F. Favrot Family Fund

808 S. New Hampshire St.

Covington, LA 70433-3733

Contact: Clifford F. Favrot, Jr., Dir.

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$2,207,393; Total giving: \$15,625
EIN: 726018687

990-PF: 2006 2005 2004 2003 2002 2001Last Updated: 1/13/2008

Donor(s)

Members of the Favrot family; Clifford F. Favrot, Jr.

Background

Incorporated in 1959 in LA.

Limitations

Giving primarily in the greater New Orleans, LA, area. No grants to individuals, or for scholarships, fellowships, research, special projects, publications, or conferences; no loans.

Purpose and Activities

Giving to educational institutions, churches, medical centers, cultural organizations, and federated giving programs.

Fields of Interest Subjects

Arts; Children/youth, services; Community/**economic development**; Education; Federated giving programs; Hospitals (general); Religion

Geographic Focus

Louisiana

Application Information

Applicants should submit the following: 1. Descriptive literature about organization; Initial approach: Letter; Deadline(s): None

Director

Clifford F. Favrot, Jr.

Financial Data Year ended 12/31/06:

Assets: \$2,207,393 (market value); Gifts received: \$10,000; Expenditures: \$15,625; Total giving: \$15,625; Qualifying distributions: \$15,625; Giving activities include: \$15,625 for grants.

Additional Location Information

County: St. Tammany; Metropolitan area: New Orleans-Metairie-Kenner, LA

Federal Home Loan Bank of Dallas Corporate Giving Program

P.O. Box 619026

Dallas, TX 75261-9026

Contact: Larry M. Marshall, Mgr., Public Affairs

E-mail: larry.marshall@fhlb.com

Type of Grantmaker: Corporate giving program

Last Updated: 9/25/2006

Limitations

Giving primarily in areas of member institution operations in AR, LA, MS, NM, and TX.

Purpose and Activities

Federal Home Loan Bank of Dallas makes charitable contributions to nonprofit organizations involved with education, housing, human services, and community development. Support is given primarily in areas of member institution operations.

Fields of Interest Subjects

Economic development; Education; Housing/shelter; Human services

Geographic Focus

Arkansas; **Louisiana**; Mississippi; New Mexico; Texas

Types of Support

General/operating support

Application Information

Application form not required. Initial approach: Proposal to headquarters;

Copies of proposal: 1

Additional Location Information

County: Dallas; Metropolitan area: Dallas-Fort Worth-Arlington, TX

Feliciana's Enrichment Center, Inc.

P.O. Box 8336

Clinton, LA 70722-1336

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/04): Assets: \$296,076; Total giving: \$657

EIN: 721277765

990-PF: 2004 2003 2001**Last Updated:** 3/20/2006

Donor(s)

L. J. Sevin

Background

Established in LA.

Limitations

Giving primarily in LA.

Fields of Interest

Subjects

Community/**economic development**; Education; Food services

Geographic Focus

Louisiana

Types of Support

General/operating support

Officers

Oliver L. Wingfield, President; George Veal, Vice President; Eunice Veal, Secretary; Ethel Wingfield, Treasurer

Financial Data Year ended 12/31/04:

Assets: \$296,076 (market value); Gifts received: \$50,000; Expenditures: \$59,509; Total giving: \$657; Qualifying distributions: \$0; Giving activities include: \$309 for 1 grant; \$348 for 1 grant to an individual; \$58,852 for foundation-administered programs

Additional Location Information

County: East Feliciana; Metropolitan area: Baton Rouge, LA

Flowerree Foundation

805 S.W. Broadway, Ste. 2290
Portland, OR 97205-3368

Type of Grantmaker

Independent foundation

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Family foundation

Financial Data (yr. ended 12/31/06): Assets: \$2,572,009; Total giving: \$58,850

EIN: 936034207

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 7/22/2007

Donor(s)

Robert E. Flowerree; Elaine D. Flowerree

Background

Established in 1961.

Limitations

Applications not accepted. Giving primarily in CA, LA, and OR. No grants to individuals.

Purpose and Activities

Giving primarily for education, religion, and gardens and the environment.

Fields of Interest Subjects

Botanical gardens; Christian agencies & churches; Community/**economic development**; Education; Environment, natural resources; Higher education; Human services; Religion

Geographic Focus

California; **Louisiana**; Oregon

Types of Support

Annual campaigns; Capital campaigns; Employee matching gifts; Seed money

Application Information

Contributes only to pre-selected organizations. Board meeting date(s): Various

Officers

Robert E. Flowerree, President; Elaine D. Flowerree, Vice President; David Munro, Secretary

Financial Data Year ended 12/31/06:

Assets: \$2,572,009 (market value); Gifts received: \$30; Expenditures: \$89,850; Total giving: \$58,850; Qualifying distributions: \$58,850; Giving activities include: \$58,850 for grants

Additional Location Information

County: Multnomah; Metropolitan area: Portland-Vancouver-Beaverton, OR-WA

Selected Grants

The following grants were reported in 2005: \$50,000 to Church Divinity School of the Pacific, Berkeley, CA, payable over 1 year; \$4,000 to Church Divinity School of the Pacific, Berkeley, CA, payable over 1 year; \$3,500 to Church Divinity School of the Pacific, Berkeley, CA, payable over 1 year; \$1,500 to Lewis and Clark College, Portland, OR, payable over 1 year; \$500 to Oregon Independent College Foundation, Portland, OR, payable over 1 year; \$100 to Collegiate Network, Wilmington, DE, payable over 1 year; \$50 to Tulane University, New Orleans, LA, payable over 1 year;

Foundation for the Mid South

134 E. Amite St.

Jackson, MS 39201-2101

Telephone: (601) 355-8167

Contact: Ivey L. Allen, Pres.; Christopher Crothers, Dir., Comms.; Dwanda Moore, Mgr., Admin.

Fax: (601) 355-6499

E-mail: ccrothers@fndmidsouth.org

URL: www.fndmidsouth.org

Type of Grantmaker: Community foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$18,277,143; Total giving: \$8,942,114

EIN: 721151070

990: 2006 2005 2004 2003 2002Last Updated: 5/8/2008

Background

Established in 1989 in MS.

Limitations

Giving limited to AR, LA, and MS.

Purpose and Activities

The foundation makes grants in three program areas: 1) Economic Development - to create an economy that works for all people; 2) Education - to create a constituency for change at the local level; and 3) Families and Children - to improve the quality of life for children and families of the mid-South.

Fields of Interest Subjects

Children/youth, services; Community/economic development; Disasters, Hurricane Katrina; **Economic development**; Education; Education, early childhood education; Family services; Leadership development; Minorities/immigrants, centers/services; Religion; Youth development, services

Population Groups

Minorities

Geographic Focus

Arkansas; **Louisiana**; Mississippi

Types of Support

Conferences/seminars; Consulting services; Continuing support; Curriculum development; General/operating support; Matching/challenge support; Program-related investments/loans; Program development

Publications

Annual report; Application guidelines; Financial statement; Grants list; Informational brochure (including application guidelines); Multi-year report; Newsletter

Application Information

Visit foundation Web site for application information. Application form required. Initial approach: Contact program staff; Copies of proposal: 1; Board meeting date(s): Feb., May, and Nov.; Deadline(s): Varies.

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Diana Lewis,* Chairperson; Charles Victor McTeer,* Vice-Chairperson; Ivey L. Allen, President; Gladys Whitney,* Secretary; William J. Bynum,* Treasurer; Ted Kendall, III, Director Emeritus; Don Munro, Director Emeritus; Hon. William Winter, Director Emeritus; Curt L. Hebert, Jr.; Beverly Wade Hogan; Nancy T. Montoya; Patrick C. Moore; Freddy Webb-Petett; Brad Williams

Number of Staff

8 full-time professional; 5 full-time support

Memberships Regional Associations of Grantmakers

Southeastern Council of Foundations

Affinity Groups

Grantmakers for Education; Neighborhood Funders Group

Associations and Other Philanthropic Organizations

Council on Foundations; Independent Sector; Louisiana Association of Nonprofit Organizations; Mississippi Center for Nonprofits

Financial Data Year ended 12/31/06:

Assets: \$18,277,143 (market value); Gifts received: \$11,340,353; Expenditures: \$11,741,943; Total giving: \$8,942,114; Giving activities include: \$8,942,114 for 385 grants (high: \$500,000; low: \$500).

Additional Location Information

County: Hinds; Metropolitan area: Jackson, MS

Jewish Funds for Justice

(formerly Jewish Fund for Justice)

330 7th Ave., Ste. 1902

New York, NY 10001-5254

Telephone: (212) 213-2113

Fax: (212) 213-2233

E-mail: info@jewishjustice.org

URL: www.jewishjustice.org

Type of Grantmaker: Public charity

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Organization that normally receives a substantial part of its support from a governmental unit or from the general public

Financial Data (yr. ended 6/30/06): Assets: \$3,726,673; Total giving: \$2,559,175

EIN: 521332694

990: 2007 2006 2005 2004 2003 2002

Last Updated: 3/5/2008

Donor(s)

The Nathan Cummings Foundation; Nancy Fischman; Steve Fischman; Alice Kuhn; Michael Kuhn; Mark Levy; Peachy Levy; Harry and Jeanette Weinberg Foundation

Background

Established in 1984 in DC.

Limitations

Applications not accepted. Giving limited to Los Angeles, CA, Miami, FL, Boston, MA, New York, NY, Milwaukee, WI and in the Gulf Coast region through the Hurricane Katrina Relief Fund. Additional funding through congregation-based community organizing grants. No support for social service programs that do not have an advocacy or organizing component, national organizations, or organizations with annual budgets over \$2,000,000. No grants to individuals or for capital expenditures.

Purpose and Activities

The fund seeks to support nonprofit organizations working to alleviate the root causes of poverty and disenfranchisement of low-income individuals in the U.S. The fund only supports groups that engage in community organizing and/or grassroots advocacy, defined here as a group of people working collectively to build political and/or economic power in order to pro-actively influence policies, decisions, laws and institutions that affect their lives. The fund also supports Jewish groups that advocate and organize on poverty issues in partnership with groups based on low-income communities and communities of color, bringing a vital Jewish presence to community economic and social justice struggles. The fund's education and outreach program seeks to raise awareness of poverty issues in Jewish communities and provide

awareness of poverty issues in Jewish communities and congregates technical assistance to Jewish organizations and congregations interested in working on campaigns around the causes and consequences of poverty.

Program Area(s)

The grantmaker has identified the following area(s) of interest:

Assisting New Americans

Groups in this issue area organize immigrants and refugees to assert their rights to fair and humane treatment and help them gain a foothold in society. The fund supports groups that educate newcomers about their rights and how to protect them, develop immigrant leaders, combat anti-immigrant policies and exploitation in the workplace, fight scapegoating and harassment, and promote civic involvement.

Building Community

Groups in this issue area strengthen low-income communities by bringing residents together into strong multi-issue neighborhood or faith-based organizations. The fund supports groups that stress long-term institutional development, view issues as a vehicle for training high-skilled leaders, use relationship-building techniques and hold decision-makers accountable for meeting democratically-determined demands.

Economic Justice

Groups in this issue area work to promote economic security and self-sufficiency for low-income individuals and their communities through campaigns such as building alliances between labor and community groups, organizing living-wage campaigns, advocating for job training and job programs, improving conditions in the workplace, organizing for community reinvestment and against predatory lending, preserving and strengthening public assistance programs, and promoting community economic development.

Engaging Jews in Social Justice

Groups in this issue area advance local Jewish activism by educating, training and mobilizing Jews in sustained efforts to combat poverty and injustice. The fund supports groups and congregations that advocate and organize on poverty issues in partnership with groups based in low-income communities of color, bringing a vital Jewish presence to community economic and social justice struggles.

Investing in Youth

Groups in this issue area use youth organizing strategies to combat economic disadvantage and hopelessness among low-income young people. The fund supports groups that improve the lives of youth and their communities through youth-developed programs, empower young people to advocate on their own behalf, train them to develop and lead issue campaigns and mobilize parents and youth to improve public education.

Women in Poverty

Groups in this issue area fight poverty among economically disadvantaged women, who are disproportionately heads of household, women of color, and immigrants and refugees. The fund supports groups that are run by and for women, that organize and advocate on issues that directly affect the lives of women and girls, that help women attain economic self-sufficiency and that provide leadership development, skills training and support networks.

Fields of Interest Subjects

Civil/human rights, immigrants; Civil/human rights, women; Community/**economic development**; Community development, neighborhood development; Education, reform; Employment

Population Groups

Economically disadvantaged; Immigrants/refugees; Women

Geographic Focus

Alabama; California; Florida; **Louisiana**; Massachusetts; Mississippi; New York; Wisconsin

Types of Support

General/operating support; Matching/challenge support; Program development; Seed money

Publications

Annual report; Grants list; Newsletter; Program policy statement

Application Information

Unsolicited requests for funds not considered or acknowledged.

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Amy B. Dean,* Co-Chairperson; Steven S. Fischman,* Co-Chairperson; Simon Greer, President and Chief Executive Officer; Jeremy Burton, Vice President, Strategic Initiatives; Lawrence N. Bailis; Ari Beliak; Vanessa Kroll Bennett; Mark J. Bernstein; Rachel Chanoff; Melissa Cordish; Steve Fahrer; Janice Fine; Debbie Fleischaker; Judith Helfand

Number of Staff

33 full-time professional; 3 part-time professional

Memberships Regional Associations of Grantmakers

New York Regional Association of Grantmakers; Southern California Grantmakers

Affinity Groups

Funders' Collaborative on Youth Organizing; Neighborhood Funders Group; PRI Makers Network

Associations and Other Philanthropic Organizations

Council on Foundations

Financial Data Year ended 6/30/06:

Revenue: \$4,538,042; Assets: \$3,726,673 (market value); Gifts received: \$4,296,550; Expenditures: \$4,363,294; Total giving: \$2,559,175; Program services expenses: \$3,367,400; Giving activities include: \$2,559,175 for grants; \$808,225 for foundation-administered programs

Additional Location Information

County: New York; Metropolitan area: New York-Northern New Jersey-Long Island, NY-NJ-PA

Eugenie and Joseph Jones Family Foundation

835 Union St., Ste. 333

New Orleans, LA 70112-1401

Telephone: (504) 584-1545

Contact: Eugenie Jones Huger, Pres.; Maryln Burrell

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$21,697,115; Total giving: \$997,533

EIN: 720507534

990-PF: 2006 2005 2004 2003 2002**Last Updated:** 5/2/2008

Donor(s)

*Note: If a donor is deceased, the symbol (‡) follows the name. Joseph M. Jones‡;
Eugenie P. Jones‡*

Background

Incorporated in 1955 in LA.

Limitations

Giving primarily in LA, especially in the greater New Orleans area. No grants to individuals, or for land acquisition, special projects, research, publications, conferences, start-up or emergency funds, or deficit financing; no loans.

Purpose and Activities

Primary areas of interest include education, community development, health and human services, and arts and cultural programs.

Fields of Interest Subjects

Arts; Community/**economic development**; Community development, neighborhood development; Education; Health care; Human services; Museums; Protestant agencies & churches

Geographic Focus

Louisiana

Types of Support

Annual campaigns; Building/renovation; Capital campaigns; Continuing support; Endowments; Equipment; Fellowships; General/operating support; Matching/challenge support; Professorships; Program development; Scholarship funds; Seed money

Publications

Application guidelines

Application Information

Application form required. Applicants should submit the following: 1. Timetable for implementation and evaluation of project; 2. Results expected from proposed grant; 3. Qualifications of key personnel; 4. Statement of problem project will address; 5. Brief history of organization and description of its mission; 6. How project's results will be evaluated or measured; 7. What distinguishes project from others in its field; 8. Listing of board of directors, trustees, officers and other key people and their affiliations; 9. Detailed description of project and amount of funding requested; 10. Copy of IRS Determination Letter; 11. Copy of current year's organizational budget and/or project budget; 12. Copy of most recent annual report/audited financial statement/990; 13. Listing of additional sources and amount of support Initial approach: Request guidelines from foundation; Copies of proposal: 1; Board meeting date(s): Mar., June, Sept., and Dec.; Deadline(s): None

Officers and Trustees

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Eugenie Jones Huger,* President; Susan Jones Gundlach,* Vice President; Elaine F. Jones,* Vice President

Number of Staff

4 part-time support

Memberships Associations and Other Philanthropic Organizations

Louisiana Association of Nonprofit Organizations

Financial Data Year ended 12/31/06:

Assets: \$21,697,115 (market value); Expenditures: \$1,225,539; Total giving: \$997,533; Qualifying distributions: \$1,043,058; Giving activities include: \$997,533 for 70 grants (high: \$100,000; low: \$1,000);

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005: \$70,000 to Contemporary Arts Center, New Orleans, LA, payable over 1 year; \$45,000 to Saint Georges Episcopal School, New Orleans, LA, payable over 1 year; \$40,000 to Planned Parenthood, Oak Harbor, WA, payable over 1 year; \$30,000 to Saint Paul Catholic School, Grosse Pointe Farms, MI, payable over 1 year; \$30,000 to Touro Infirmary Foundation, New Orleans, LA,

payable over 1 year; \$20,000 to Arts Council, Huntsville, AL, payable over 1 year; \$20,000 to Idea Village, New Orleans, LA, payable over 1 year; \$20,000 to Teach for America, New York, NY, payable over 1 year; \$10,000 to Isidore Newman School, New Orleans, LA, payable over 1 year; \$6,000 to Preservation Resource Center, Charleston, SC, payable over 1 year.

Keller Family Foundation

P.O. Box 13625

New Orleans, LA 70185-3625

Contact: Mary Keller Zervigon, Pres.

URL: kellerfamilyfoundation.org/index.html

Type of Grantmaker

Independent foundation

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Family foundation

Financial Data (yr. ended 12/31/06): Assets: \$15,001,892; Total giving: \$705,055

EIN: 726027426

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 1/18/2008

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name. Charles Keller, Jr.‡;
Rosa F. Keller‡

Background

Established in 1949 in LA. The Keller Family Foundation was originally formed as the Lincoln Foundation in 1949 by Charles Keller, Jr. and Rosa Freeman Keller with 10 shares of Coca-Cola Company stock. Mr. and Mrs. Keller made various additional contributions to the foundation throughout their lives. They were instrumental, both as a couple and individually, in developing affordable housing for New Orleans's African-American community and integrating the city's public libraries and swimming pools.

Limitations

Giving primarily in New Orleans, LA. No grants to individuals, or for tickets or fundraisers.

Purpose and Activities

The foundation has interests in education, youth development, human services, and public affairs.

Fields of Interest Subjects

Arts; Community/**economic development**; Education; Federated giving programs; Higher education; Human services

Geographic Focus

Louisiana

Types of Support

Capital campaigns; General/operating support; Management development/capacity building; Matching/challenge support

Application Information

Applicants must complete the Southeast Louisiana Association of Grantmakers Common Application Form or acceptable substitute from foundation Web site.

Application form required. Applicants should submit the following:

1. Name, address and phone number of organization;
2. Copy of IRS Determination Letter;
3. Copy of most recent annual report/audited financial statement/990;
4. Listing of board of directors, trustees, officers and other key people and their affiliations;
5. Detailed description of project and amount of funding requested;
6. Contact person;
7. Copy of current year's organizational budget and/or project budget;
8. Listing of additional sources and amount of support

Initial approach: 3-page proposal. See foundation Web site for guidelines. Copies of proposal: 2
Board meeting date(s): Apr. and Nov.; Deadline(s): Feb. 1 for spring meeting, and Sept. 15 for fall meeting.

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Mary K. Zervigon,* President; Luis C. Zervigon,* Secretary; Caroline K. Loughlin,* Treasurer; Thomas K. Loughlin; Andres M. Zervigon

Number of Staff

None

Memberships Regional Associations of Grantmakers

Southeastern Council of Foundations

Associations and Other Philanthropic Organizations
Council on Foundations

Financial Data Year ended 12/31/06:

Assets: \$15,001,892 (market value); Expenditures: \$713,029; Total giving: \$705,055; Qualifying distributions: \$705,055; Giving activities include: \$705,055 for 1 grant.

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005: \$630,795 to Greater New Orleans Foundation, New Orleans, LA, payable over 1 year.

Kirschman Foundation for Health and Education

P.O. Box 26427

New Orleans, LA 70186-6427

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$925,657; Total giving: \$118,390

EIN: 726033084

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 1/13/2008

Donor(s)

Patricia Kirschman; Richard Kirschman; Margery A. Kirschman; Victor F. Kirschman; Morris Kirschman & Co., Inc.

Background

Established in 1967 in LA.

Limitations

Applications not accepted. Giving primarily in New Orleans, LA. No grants to individuals.

Purpose and Activities

Giving primarily for education and human services.

Fields of Interest

Subjects

American Red Cross; Community/**economic development**; Disasters, Hurricane Katrina; Education; Federated giving programs; Health care; Health organizations, association; Historic preservation/historical societies; Human services; Jewish federated giving programs; Religion; Youth development

Geographic Focus

Louisiana

Types of Support

General/operating support

Application Information

Contributes only to pre-selected organizations.

Trustees

Arnold Kirschman; Margery A. Kirschman; Victor F. Kirschman; Fanny Benjamine Lanne

Financial Data Year ended 12/31/06:

Assets: \$925,657 (market value); Gifts received: \$122,500; Expenditures: \$130,733; Total giving: \$118,390; Qualifying distributions: \$118,390; Giving activities include: \$118,390 for grants

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2005: \$100,000 to University of New Orleans Foundation, New Orleans, LA, payable over 1 year; \$10,000 to Jewish Federation of Greater New Orleans, Metairie, LA, payable over 1 year; \$3,000 to Saint George Episcopal School, San Antonio, TX, payable over 1 year; \$2,500 to United Way for the Greater New Orleans Area, New Orleans, LA, payable over 1 year; \$2,085 to Touro Synagogue, New Orleans, LA, payable over 1 year; \$1,000 to American Red Cross, New Orleans, LA, payable over 1 year; \$500 to Congregation of Temple Sinai, South Burlington, VT, payable over 1 year; \$500 to Eisenhower Medical Center, Rancho Mirage, CA, payable over 1 year; \$300 to Archbishops Community Appeal, New Orleans, LA, payable over 1 year; \$38 to National World War II Museum, New Orleans, LA, payable over 1 year.

Levy Rosenblum Family Foundation

2424 Edenborn Ave., Ste. 108

Metairie, LA 70001-6461

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 6/30/06): Assets: \$937,363; Total giving: \$91,750

EIN: 721052983

990-PF: 2007 2006 2005 2004 2003 2002Last Updated: 1/14/2007

Donor(s)

Louise L. Levy; Paul S. Rosenblum

Background

Established in 1985 in LA.

Limitations

Applications not accepted. Giving primarily in New Orleans, LA. No grants to individuals.

Purpose and Activities

Giving primarily to Jewish organizations, higher and other education, and social services.

Fields of Interest Subjects

Arts; Civil/human rights; Community/**economic development**; Education; Family services; Federated giving programs; Higher education; Human services; Jewish agencies & temples; Museums (history)

Geographic Focus

Louisiana

Application Information

Contributes only to pre-selected organizations.

Officer and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Paul S. Rosenblum, * President; Edward D. Levy, Jr., M.D.;

Louise L. Levy; Louise Rosenblum Margolis; Edith L. Rosenblum; Paul S. Rosenblum, Jr.

Financial Data Year ended 6/30/06:

Assets: \$937,363 (market value); Gifts received: \$150,000; Expenditures: \$113,979;
Total giving: \$91,750; Qualifying distributions: \$91,750; Giving activities include:
\$91,750 for grants

Additional Location Information

County: Jefferson; Metropolitan area: New Orleans-Metairie-Kenner, LA

Louisiana Disaster Recovery Foundation, Inc.

445 N. 6th St., Ste. 200

Baton Rouge, LA 70801-5511

Telephone: (225) 435-7521

Fax: (225) 383-1858

E-mail: info@louisianahelp.org

URL: www.louisianahelp.org

Type of Grantmaker: Public charity

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Organization that normally receives more than 33 1/3% of its support from contributions, etc.

Financial Data (yr. ended 6/30/06): Assets: \$19,694,900; Total giving: \$6,484,000

EIN: 203399944

990: 2006Last Updated: 5/12/2008

Additional Contact Information

Toll-free tel.: (877) 435-7521

Background

Established in 2005 in LA.

Limitations

Giving limited for the benefit of LA. No support for organizations that discriminate or otherwise restrict participation on the basis of ethnicity, lifestyle, gender,

age, or religion. No grants to individuals, or for event sponsorship, capital expenditures, general operating expenses, or reimbursable or duplicative expenses.

Purpose and Activities

The mission of the foundation is to transform the disaster caused by hurricanes Katrina and Rita into an unprecedented opportunity for a new Louisiana - providing resources for the relief, recovery, and betterment of all its people by ensuring access and opportunity in rebuilding their communities and culture.

Fields of Interest Subjects

Community/**economic development**; Community development, neighborhood associations; Community development, neighborhood development; Community development, small businesses; Housing/shelter

Geographic Focus

Louisiana

Publications

Grants list

Application Information

After review of the letter of interest, if the organization meets the criteria, a full grant proposal will be requested and an application form will be forwarded. Full proposals should only be submitted upon request. Application form required. Applicants should submit the following: 1. Copy of current year's organizational budget and/or project budget; Initial approach: Letter of interest (no more than 2 pages); Deadline(s): Rolling basis

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Amb. James A. Joseph,* Chairperson; C. Berwick Duval, II,* Vice-Chairperson; Flozell Daniels, Jr., President and Chief Executive Officer; John Redd, III,* Secretary-Treasurer; Brenda Stewart Birkett, Ph.D.; E. Renae Conley; Julio Galan; Linetta J. Gilbert; Sibal S. Holt; Lt. Genl. Russel Honore; R. King Milling

Memberships Affinity Groups

Neighborhood Funders Group

Associations and Other Philanthropic Organizations

Council on Foundations

Financial Data Year ended 6/30/06:

Revenue: \$26,458,693; Assets: \$19,694,900 (market value); Gifts received: \$26,195,724; Expenditures: \$6,773,015; Total giving: \$6,484,000; Program services expenses: \$6,576,172; Giving activities include: \$6,484,000 for grants.

Additional Location Information

County: East Baton Rouge; Metropolitan area: Baton Rouge, LA

The Jess Merkle Foundation

7717 Creswell Rd., Ste. 18
Shreveport, LA 71106-6031

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 6/30/07): Assets: \$8,493,491; Total giving: \$302,052

EIN: 721336331

990-PF: 2007 2006 2005 2004 2003 2002**Last Updated:** 1/13/2008

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name. Lyda T. Merkle‡

Background

Established in 1997 in LA.

Limitations

Applications not accepted. Giving primarily in LA. No grants to individuals.

Purpose and Activities

Primarily giving for human services; funding also for a United Methodist church.

Fields of Interest Subjects

Community/**economic development**; Education; Human services; Protestant agencies & churches; Salvation Army

Geographic Focus

Louisiana

Types of Support

Endowments; General/operating support

Application Information

Contributes only to pre-selected organizations.

Trustee

Paul Merkle

Financial Data Year ended 6/30/07:

Assets: \$8,493,491 (market value); Expenditures: \$402,346; Total giving: \$302,052; Qualifying distributions: \$304,365; Giving activities include: \$302,052 for 13 grants (high: \$65,000)

Additional Location Information

County: Caddo; Metropolitan area: Shreveport-Bossier City, LA

Selected Grants

The following grants were reported in 2006: \$200,000 to Salvation Army, payable over 1 year; \$25,000 to Shreveport-Bossier Community Renewal, Shreveport, LA, payable over 1 year; \$10,000 to Volunteers of America, payable over 1 year.

Michele Favrot Murphy Family Fund

5818 Patton St.

New Orleans, LA 70115-3231

Telephone: (504) 896-8980

Contact: Michele F. Murphy, Secy.-Treas.

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$276,904; Total giving: \$6,676

EIN: 721318621

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 1/13/2008

Donor(s)

Aimee F. Bell; Michele F. Murphy

Background

Established in 1995 in LA.

Limitations

Giving primarily in New Orleans, LA. No grants to individuals.

Fields of Interest Subjects

Christian agencies & churches; Community/**economic development**

Geographic Focus

Louisiana

Application Information

Application form not required. Deadline(s): None

Officers

Kevin Murphy, Chairperson and President; Aimee F. Bell, Vice President; Julie F. Vickers, Vice President; Michele F. Murphy, Secretary-Treasurer

Financial Data Year ended 12/31/06:

Assets: \$276,904 (market value); Expenditures: \$7,426; Total giving: \$6,676; Qualifying distributions: \$6,676; Giving activities include: \$6,676 for 16 grants (high: \$2,030; low: \$50)

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

The Greater New Orleans Foundation

1055 St. Charles Ave., Ste. 100

New Orleans, LA 70130-3981

Telephone: (504) 598-4663

Contact: For grants: Richard A. Martinez, Prog. Off.; Gregory Ben Johnson, C.E.O.

Fax: (504) 598-4676

E-mail: benj@gnof.org

URL: www.gnof.org

Type of Grantmaker: Community foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/05): Assets: \$134,603,157; Total giving: \$8,659,432

EIN: 720408921

990: 2006 2005 2004 2003 2002**Last Updated:** 2/26/2008

Additional Contact Information

E-mail for Donor-Advised fund grant recommendations to the Rebuild New Orleans Fund: GNOFgrants@gnof.org

Background

Established in 1924 in LA as the Community Chest; became a community foundation in 1983. At the close of 2005, the market value of the foundation's assets totaled \$134.6 million, an 11 percent increase over the 2004 value (\$120.7 million).

Limitations

Giving limited to southeastern LA, including the greater New Orleans area. No support for religious activities. No grants to individuals, or for annual fund campaigns, capital expenditures, sponsorship of special events, trips, continuing support, endowment funds, equipment, building funds, or deficit financing.

Purpose and Activities

The foundation will respond to the New Orleans region with data-driven grantmaking in the areas of: 1) excellence in education; 2) economic expansion and job training; 3) affordable housing/neighborhood development; 4) race and equity; and 5) sustaining and developing nonprofit capacity.

Program Area(s)

The grantmaker has identified the following area(s) of interest:

Rebuild New Orleans Fund

In response to the devastation caused by Hurricane Katrina, the foundation has established the Rebuild New Orleans Fund designated for the relief, recovery and betterment of the community and city. This fund will focus on three principles: 1) creating an infrastructure of a community that works for everyone; 2) rebuilding a better New Orleans than the one left; and 3) honoring the social contract to involve the Greater New Orleans community in the process. These philanthropic dollars will enable a broader voice to be heard during the restructuring process and will provide best practices during the researching, planning and rebuilding progression. The foundation encourages contributors to help in the restoration and rebuilding of the

area by donating to the Rebuild New Orleans Fund. Please mail tax deductible contributions to: The Greater New Orleans Foundation, Rebuild New Orleans Fund, 1055 St. Charles Ave., Ste. 100, New Orleans, LA 70130. Visit foundation Web site for more information.

Fields of Interest Subjects

Arts; Community/economic development; Crime/violence prevention; Disasters, Hurricane Katrina; **Economic development**; Education; Employment; Environment; Food services; Health care; Health organizations, association; Housing/shelter; Human services; Philanthropy/voluntarism; Public affairs; Recreation; Youth development

Geographic Focus

Louisiana

Types of Support

Emergency funds; Management development/capacity building; Matching/challenge support; Program development; Program evaluation; Seed money; Technical assistance

Publications

Annual report; Informational brochure; Program policy statement

Application Information

Each competitive grantmaking fund is governed by different grantmaking priorities, criteria and guidelines. Visit foundation Web site for application information per grant type. Board meeting date(s): Quarterly; Deadline(s): Varies; Final notification: Varies

Officers and Trustees

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Myron E. Moorehead, M.D.,* Chairperson; Phyllis M. Taylor,* Vice-Chairperson; Ryan Crespino, Vice President, Finance and Admin.; Martha McDermott Landrum, Vice President, Development and Communications; Orlando C. Watkins, Vice President, Programs; Anthony Recasner, Ph.D.,* Secretary; John D. Becker,* Treasurer; Cherie F. Thompson, Controller; Madlyn B. Bagneris; Kim M. Boyle; Edgar L. Chase, III; Philip F. Cossich, Jr.; Joseph Failla, II; Ludovico Feoli; David Francis; Richard W. Freeman, Jr.; Philip J. Gunn; Paul M. Haygood; Scott P. Howard; Robert E. Howson; Henry M. Lambert; Leann O. Moses; Andree K. Moss; Rajender K. Pannu; M. Cleland Powell, III; Michael O. Read; William H. Shane, Jr.; Gary N. Solomon; Stephen L. Sontheimer; Cheryl R. Teamer; David R. Voelker; Joseph E. Williams

Number of Staff

5 full-time professional; 3 full-time support

Memberships Regional Associations of Grantmakers

Southeastern Council of Foundations

Affinity Groups

Environmental Grantmakers Association; Funders' Network for Smart Growth and Livable Communities

Associations and Other Philanthropic Organizations

Council on Foundations; Louisiana Association of Nonprofit Organizations

Financial Data Year ended 12/31/05:

Assets: \$134,603,157 (market value); Gifts received: \$16,927,205; Expenditures: \$10,664,495; Total giving: \$8,659,432; Giving activities include: \$8,659,432 for grants

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Newtron Group Charitable Foundation

8133 W. El Cajon Dr.
Baton Rouge, LA 70815-8035

Type of Grantmaker: Company-sponsored foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$1; Total giving: \$3,802

EIN: 721169073

990-PF: 2006 2005 2004 2003 2002 2001**Last Updated:** 1/13/2008

Donor(s)

The Newtron Group, Inc.

Background

Established in 1990 in LA.

Limitations

Applications not accepted. Giving primarily in LA. No grants to individuals.

Purpose and Activities

The foundation supports organizations involved with arts and culture, animals and wildlife, human services, and community development.

Fields of Interest Subjects

Animals/wildlife, preservation/protection; Arts; Boy scouts; Community/**economic development**; Federated giving programs; Human services

Geographic Focus

Louisiana

Types of Support

General/operating support

Application Information

Contributes only to pre-selected organizations.

Directors

John H. Thomas; Newton Buckner Thomas

Financial Data Year ended 12/31/06:

Assets: \$1 (market value); Expenditures: \$3,808; Total giving: \$3,802; Qualifying distributions: \$3,802; Giving activities include: \$3,802 for grants

Additional Location Information

County: East Baton Rouge; Metropolitan area: Baton Rouge, LA

The RosaMary Foundation

P.O. Box 13218

New Orleans, LA 70185-3218

Telephone: (504) 895-1984

Contact: Richard W. Freeman, Jr., Chair.

Fax: (504) 895-1988

URL: www.rosamary.org

Type of Grantmaker

Independent foundation

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Family foundation

Financial Data (yr. ended 12/31/06): Assets: \$57,499,029; Total giving: \$2,294,762

EIN: 726024696

990-PF: 2006 2005 2004 2003 2002 2001

E-Grant Reporter

Last Updated: 1/13/2008

Donor(s)

Members of the A.B. Freeman family

Background

Trust established in 1939 in LA. The foundation's name honors Rosa, the younger, and Mary, the elder, daughters of Alfred B. Freeman, who had established the foundation.

Limitations

Giving primarily in the greater New Orleans, LA, area. No grants to individuals.

Purpose and Activities

Emphasis on a community fund, higher and secondary education, including church-related schools, social service agencies, civic affairs, and cultural programs.

Fields of Interest

Subjects

Arts; Community/**economic development**; Government/public administration; Higher education; Human services; Secondary school/education

Geographic Focus

Louisiana

Types of Support

Annual campaigns; Building/renovation; Capital campaigns; Continuing support; Endowments; General/operating support; Program development; Seed money

Publications

Application guidelines

Application Information

Application form and summary sheet available on foundation Web site. Application form required. Applicants should submit the following: 1. Timetable for implementation and evaluation of project; 2. How project will be sustained once grantmaker support is completed; 3. Signature and title of chief executive officer; 4. Results expected from proposed grant; 5. Qualifications of key personnel; 6. Statement of problem project will address; 7. Population served; 8. Copy of IRS Determination Letter; 9. Brief history of organization and description of its mission; 10. Geographic area to be served; 11. How project's results will be evaluated or measured; 12. Listing of board of directors, trustees, officers and other key people and their affiliations; 13. Detailed description of project and amount of funding requested; 14. Plans for cooperation with other organizations, if any; 15. Copy of current year's organizational budget and/or project budget; 16. Listing of additional sources and amount of support; Initial approach: Proposal in letter form (no more than 3 pages); Copies of proposal: 1; Board meeting date(s): Approximately 2 times a year beginning in spring; Deadline(s): Feb. 1 and Sept. 1

Officer and Trustees

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Richard W. Freeman, Jr.,* Chairperson; Adelaide Wisdom Benjamin; Louis M. Freeman, Jr.; Tina Freeman; Caroline Loughlin; Andrew Wisdom Betty Wisdom; Carlos Zervigon; Mary Zervigon

Memberships Regional Associations of Grantmakers

Southeastern Council of Foundations

Financial Data Year ended 12/31/06:

Assets: \$57,499,029 (market value); Expenditures: \$2,725,944; Total giving: \$2,294,762; Qualifying distributions: \$2,344,200; Giving activities include: \$2,294,762 for 50 grants (high: \$400,000)

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

Selected Grants

The following grants were reported in 2006: \$400,000 to Xavier University of Louisiana, New Orleans, LA. For general support for Hurricane Relief Fund, payable over 1 year; \$165,000 to Greater New Orleans Foundation, New Orleans, LA. For Funding for Common Good, payable over 4 years; \$150,000 to Audubon Charter School, New Orleans, LA. For Audubon start-up as charter school after Katrina,

payable over 1 year; \$150,000 to Benjamin Franklin High School, New Orleans, LA. For funds to restart and operate Ben Franklin High School as Type III Charter School, payable over 1 year; \$150,000 to Lusher Alternative Elementary, New Orleans, LA. For start-up funding for development of Lusher Charter School, payable over 1 year; \$100,000 to Choice Foundation, New Orleans, LA. For Start-Up Funds for Lafayette Academy Charter School, payable over 1 year; \$100,000 to Providence Community Housing, New Orleans, LA. For Building Equitable, Affordable and Sustainable Community in Historic Lafitte and Treme Neighborhood, payable over 1 year; \$45,000 to New Orleans Creative Glass Institute, New Orleans, LA. For start-up campaign for NOCGI, payable over 1 year; \$35,000 to Louisiana Philharmonic Orchestra, New Orleans, LA. For Renewal of Annual Support, payable over 1 year; \$15,000 to New Orleans Ballet Association, New Orleans, LA. For after-school program for youth development, payable over 1 year

Scott Foundation, Inc.

P.O. Box 4948

Monroe, LA 71211-4948

Telephone: (318) 387-4160

Contact: T.H. Scott

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 7/31/06): Assets: \$28,407,205; Total giving: \$1,229,889

EIN: 726027563

990-PF: 2007 2006 2005 2004 2003 2002**Last Updated:** 12/19/2007

Donor(s)

Scott Truck & Tractor Co.; Gold Mine Gin, Inc.

Background

Established in 1992 in LA.

Limitations

Giving primarily in northern LA.

Purpose and Activities

Giving primarily to Christian churches, education, youth organizations, health care, human services, and civic organizations; funding also for victims of Hurricane Katrina.

Fields of Interest Subjects

Community/**economic development**; Disasters, Hurricane Katrina; Health care; Higher education; Human services; Medical research; Protestant agencies & churches; Recreation; Secondary school/education; Youth, services

Geographic Focus

Louisiana

Types of Support

Scholarship funds

Application Information

Application form not required. Deadline(s): None

Officers

Betty S. Cummins, Chairperson; G.J. Bershen, Secretary-Treasurer; Paula Brodnax, Secretary

Trustees

Sam Adams; Hugh McDonald; John Mullins; T.H. Scott, Jr.

Financial Data Year ended 7/31/06:

Assets: \$28,407,205 (market value)

Gifts received: \$18,500; Expenditures: \$1,528,055; Total giving: \$1,229,889;

Qualifying distributions: \$1,240,669; Giving activities include: \$1,121,381 for 646 grants (high: \$100,000; low: \$25); \$108,508 for 31 grants to individuals (high: \$30,895; low: \$242)

Additional Location Information

County: Ouachita; Metropolitan area: Monroe, LA

Selected Grants

The following grants were reported in 2006: \$100,000 to Saint Jude Childrens Research Hospital, Memphis, TN, payable over 1 year; \$50,000 to Biomedical Research Foundation, Cottonwood, CA, payable over 1 year; \$50,000 to Covenant House New Orleans, New Orleans, LA, payable over 1 year; \$35,000 to Louisiana Baptist Childrens

Home, Monroe, LA, payable over 1 year; \$20,000 to United Way of Northeast Louisiana, Monroe, LA, payable over 1 year; \$4,500 to Muscular Dystrophy Association, New Orleans, LA, payable over 1 year; \$2,000 to Louisiana Baptist Childrens Home, Monroe, LA, payable over 1 year; \$500 to American Cancer Society, Fort Smith, AR, payable over 1 year; \$500 to Saint Jude Childrens Research Hospital, Memphis, TN, payable over 1 year; \$500 to United Way of Northeast Louisiana, Monroe, LA, payable over 1 year.

Second Chance Foundation

517 N. New Hampshire St.
Covington, LA 70433-2807

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 12/31/06): Assets: \$45; Total giving: \$115,366

EIN: 311494451

990-PF: 2006 2005 2004 2003 2002 2001 **Last Updated:** 9/11/2007

Donor(s)

Michael G. Sanderson

Background

Established in 1996 in LA.

Limitations

Applications not accepted. Giving primarily in LA.
No grants to individuals.

Purpose and Activities

Giving primarily for education, children, youth and social services, including a Methodist home for children, community development, and Christian agencies and churches.

Fields of Interest**Subjects**

Children/youth, services; Christian agencies & churches; Community/economic development; Education; Elementary/secondary education; Higher education; Human services; Vocational education

Geographic Focus

Louisiana

Application Information

Contributes only to pre-selected organizations.

Officers and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director. Michael G. Sanderson,* President; David Israel,* Secretary-Treasurer; Allyson May, Manager*

Financial Data Year ended 12/31/06:

Assets: \$45 (market value); Gifts received: \$117,200; Expenditures: \$117,273; Total giving: \$115,366; Qualifying distributions: \$117,272; Giving activities include: \$115,366 for 14 grants (high: \$50,000; low: \$200)

Additional Location Information

County: St. Tammany; Metropolitan area: New Orleans-Metairie-Kenner, LA

Total Community Action, Inc.

1420 S. Jefferson Davis Pkwy.

New Orleans, LA 70125

Telephone: (504) 872-0334

Fax: (504) 872-0339

E-mail: tca@tca-nola.org

URL: www.tca-nola.org

Type of Grantmaker: Public charity

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Organization that normally receives a substantial part of its support from a governmental unit or from the general public

Financial Data (yr. ended 12/31/06): Assets: \$7,208,923; Total giving: \$5,231,132

EIN: 720599165

990: 2006 2005 2004 2003 2002**Last Updated:** 1/13/2008

Background

Established in 1964 in LA.

Limitations

Giving limited to the New Orleans, LA, area.

Purpose and Activities

The organization attempts to ease the social and economic conditions that perpetuate poverty and near-poverty in the New Orleans, Louisiana area by providing direct assistance and the opportunity for people to better help themselves. Services offered include early childhood development (through administering Head Start programs in the New Orleans area), energy and water assistance (through low-income home energy assistance programs), weatherization, job counseling and guidance, transportation for the elderly and disabled, commodity distribution, youth work experience, and a telephone tape library that provides information on a variety of subjects.

Fields of Interest Subjects

Children/youth, services; Community/**economic development**; Education, early childhood education; Employment, services; Housing/shelter, services; Human services, self-help groups; Human services, transportation; Youth development

Geographic Focus

Louisiana

Officer and Directors

Note: An asterisk () following an individual's name indicates an officer who is also a trustee or director.* Hon. James Singleton,* Chairperson; Sandra A. Berry; Ellenese Brooks-Simms; Lisa Burns; Hon. Ann Duplessis; Hon. Cheryl Gray; Johnny Jackson, Jr.; Danielle Johnson-Young; Hon. Arthur Morrell

Financial Data Year ended 12/31/06:

Revenue: \$16,670,710; Assets: \$7,208,923 (market value); Gifts received: \$15,010,176; Expenditures: \$14,856,114; Total giving: \$5,231,132; Program services

expenses: \$13,806,888; Giving activities include: \$4,892,471 for grants; \$338,661 for grants to individuals; \$8,575,756 for foundation-administered programs

Additional Location Information

County: Orleans; Metropolitan area: New Orleans-Metairie-Kenner, LA

United Way of St. Charles

13207 River Rd.

P.O. Box 157

Luling, LA 70070-4168

Telephone: (985) 331-9063

Fax: (985) 331-9069

E-mail: pank@uwaysc.org

URL: www.uwaysc.org

Type of Grantmaker: Public charity

IRS Exemption Status: 501(c)(3)

Additional Descriptor: Federated funder Organization that normally receives a substantial part of its support from a governmental unit or from the general public

Financial Data (yr. ended 6/30/06): Assets: \$4,086,884; Total giving: \$1,301,772

EIN: 720928066

990: 2006 2005 2004 2003 2002**Last Updated:** 1/13/2008

Background

Established in 1982 in LA.

Limitations

Giving limited to St. Charles parish, LA.

Purpose and Activities

The United Way of St. Charles seeks to lead and unite the community in providing a program of health and human services that is comprehensive, efficient and effective.

Fields of Interest Subjects

Aging, centers/services; Children/youth, services; Community/**economic development**; Family services; Health care; Human services; Youth development

Geographic Focus

Louisiana

Officers

Dennis Nuss, President; Kathryn Ostadal, Vice President; Audrey Raziano, Secretary; Denise Brodsky, Executive Director

Board Members

Eddie Boyd; Rochelle Cancienne; Jeff Funkhouser; Lily Galland; Ron Guillory; Dan McNeill

Memberships

Associations and Other Philanthropic Organizations

Louisiana Association of Nonprofit Organizations

Financial Data Year ended 6/30/06:

Revenue: \$1,031,575; Assets: \$4,086,884 (market value); Gifts received: \$900,357; Expenditures: \$1,495,803; Total giving: \$1,301,772; Program services expenses: \$1,324,863; Giving activities include: \$1,301,772 for grants; \$23,091 for foundation-administered programs

Additional Location Information

County: St. Charles; Metropolitan area: New Orleans-Metairie-Kenner, LA

The Wheless Foundation

c/o Regions Bank

333 Texas St., LASH30202J

Shreveport, LA 71101-3666

Contact: Barbara R. York

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data (yr. ended 10/31/07): Assets: \$7,284,500; Total giving: \$347,775

EIN: 726017724

990-PF: 2007 2006 2005 2004 2003 2002**Last Updated:** 5/13/2008

Donor(s)

Note: If a donor is deceased, the symbol (‡) follows the name. N. Hobson Wheless‡

Background

Established in 1945 in LA.

Limitations

Giving primarily in northwest LA. No grants to individuals.

Purpose and Activities

Giving primarily for health and human services and to Christian churches.

Fields of Interest Subjects

Aging, centers/services; Children/youth, services; Christian agencies & churches; Community/**economic development**; Federated giving programs; Health organizations, association; Higher education

Geographic Focus

Louisiana

Types of Support

Annual campaigns; Building/renovation; Capital campaigns; Continuing support; General/operating support; Program development; Research

Application Information

Application form not required. Initial approach: Letter; Copies of proposal: 1; Board meeting date(s): Annually in Oct.; Deadline(s): None.

Board Members

Jim Devane; Elise W. Hogan; Nicholas Hobson Wheless, Jr.

Number of Staff

3 shared staff

Financial Data Year ended 10/31/07:

Assets: \$7,284,500 (market value); Expenditures: \$383,877; Total giving: \$347,775; Qualifying distributions: \$356,598; Giving activities include: \$347,775 for 63 grants (high: \$51,300; low: \$100)

Additional Location Information

County: Caddo; Metropolitan area: Shreveport-Bossier City, LA

Selected Grants

The following grants were reported in 2006: \$25,000 to Shreveport-Bossier Community Renewal, Shreveport, LA, payable over 1 year; \$21,000 to Santa Fe Animal Shelter and Humane Society, Santa Fe, NM, payable over 1 year; \$18,000 to United Way of Northwest Louisiana, Shreveport, LA, payable over 1 year; \$11,000 to Shreveport Regional Arts Council, Shreveport, LA, payable over 1 year; \$10,000 to Steadman Hawkins Research Foundation, Vail, CO, payable over 1 year; \$8,500 to Santa Fe Community Foundation, Santa Fe, NM, payable over 1 year; \$5,000 to Biomedical Research Foundation, Cottonwood, CA, payable over 1 year; \$5,000 to Food Depot, Santa Fe, NM, payable over 1 year; \$5,000 to Food for Santa Fe, Santa Fe, NM, payable over 1 year; \$1,000 to Heart and Soul Animal Sanctuary, Santa Fe, NM, payable over 1 year

APPENDIX C: ASSESSMENT QUESTIONNAIRE

- 1) How would you rate GNO, Inc. over the past few years?
 - > Using a scale from 1 being the worst and 10 being the best
 - > Why did you rank the organization the way you did?

- 2) Are you in favor of the program priorities as outlined in the pre-case (*appendix g*)?

- 3) Rate the three major priority areas from most to least important
 - Business Development _____
 - Workforce _____
 - Public Policy _____

- 4) Are you comfortable with a multi-year commitment?
Does cycle length make a difference to you?

- 5) What are the three biggest challenges impacting the regions ability to grow?

- 6) Do you feel a 50% increase in funding for GNO, Inc. is a reasonable goal (\$1.8 MIL to \$2.7 MIL)?

- 7) What challenges do you foresee to GNO, Inc.'s ability to move forward with a campaign?

- 8) (*Qualified for investors*)
Will you consider a new pledge?

Will you consider an increase that corresponds with the increased budgetary need?

- 9) (*Qualified for non-investors*)
Would you be inclined to support GNO, Inc. financially in the next budget cycle?

- 10) Are there any issues or comments that we have not covered which you feel are salient to the conversation?



WHO IS GNO, Inc.?

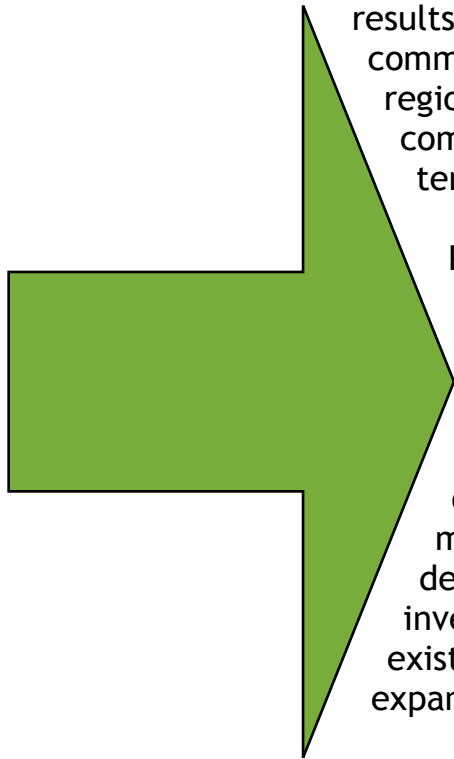
GNO, Inc., is the 10 parish regional economic development organization serving as a catalyst to create opportunities to sustain new investment, growth and development throughout the region.

Launched in January 2004, GNO, Inc. embarked on a mission that continues today to create and implement a coordinated economic development course for the region. Its well intentioned initial focus was to land major projects working with parishes while piecing together a coherent strategy to overcome years of a disjointed development pattern among regional stakeholders. The sudden intrusion of Katrina created unfathomable challenges for the region and for GNO, Inc. but it also offered the organization a chance to complete a self appraisal to refresh its organization focus and accelerate its solutions to promote regional economic development.

WHAT WE ARE PROPOSING: GNO, Inc. *forward*

**A Five Year Economic Acceleration
Program to Strengthen the Greater
New Orleans Region**

TAKING OUR ECONOMIC DEVELOPMENT EFFORTS *forward*



The GNO, Inc. *forward* program eagerly embraces the results of the self appraisal as well as its commitment to accelerating solutions to promote regional economic development by implementing a compatible strategy of closely partnering with the ten parish economic development organizations while advancing a regional economic development Roadmap. The effort is built upon GNO, Inc. having positioned itself as a “best practice” cutting edge economic development organization coordinating a cohesive linkage among Business Development, Public Policy advocacy, and Workforce solutions under one umbrella. This next level assures solid opportunities for the region to yield significant, measurable economic growth benefits in the next decade to include generating new capital investment, increasing jobs, and improving the existing business environment to assure retention and expansion of firms.

WHY GNO, Inc. *forward*?

Our ten parish region with its 1.4 million residents competes with 18,000 other defined communities and regions throughout the nation to attract new investment and development, as well as fend off attempts to draw businesses away from the region. More often than not, that competition is nationwide and even worldwide in nature. Through the Economic Development Roadmap GNO, Inc. has begun to launch, it has put the region and each of the parishes in a strong competitive position for growth and retention with those 18,000 challengers. The two prong strategy embedded throughout the Roadmap highlights the economic diversity among parishes as an asset while identifying four target industry sectors with strong commonality throughout the region. The Roadmap’s relevancy to the region’s and individual parish needs includes targets and goals providing measurable accountability.

A RETROSPECT FOR BUILDING A BRIGHTER FUTURE

- 2001-2003** Assessment of Regional Economic Development Structure Undertaken. MetroVision and Chamber Boards Merge to Focus and Consolidate Regional Economic Development Leadership and Strategy. Local Chambers Consolidated / Organized in Each Parish. 5-Year Fundraising Campaign Completed
- 2004** GNO, Inc. Formally Launched and Funded Through a 5-Year Campaign
- 2005** Hurricanes Rita and Katrina
- 2006** GNO, Inc. moves quickly to resume full operations post Katrina with short term funding and operating focus
- 2007** International Economic Development Council (IEDC) expert team at request of GNO, Inc. completes frank appraisal of relationship with parish partners and internal organization focus resulting in fully implemented corrective Action White Paper
- 2007-2008** AngelouEconomics economic development Roadmap commissioned by GNO, Inc. with thorough vetting and input with parish partners is completed and positioned for implementation

SELECTED MAJOR ACCOMPLISHMENTS BY GNO, INC. AND ITS PARTNERS SINCE DECEMBER 1, 2007:

Worked with over 215 companies, and more than 125 prospects.

Addressed expansion opportunities with over 85 local companies.

Secured the award of \$8 million from the Louisiana Workforce Commission to train, place and retain 2,000 individuals for advanced manufacturing and healthcare for over a dozen occupations throughout the region.

Worked to craft and lobby with stakeholders a \$100 million insurance business incentive legislation to attract companies to Louisiana and funding to launch a marketing campaign.

Strengthened and built on relationships and alliances with the 10 parishes

Partnered with other stakeholders in the development of the Zachary Taylor mega-site

Assembled the Louisiana Partnership for Aerospace to further the aerospace industry.

Advocated for state funding of \$20 million for equipment at NASA Michoud Assembly Plant to help attract the Orion Constellation program.

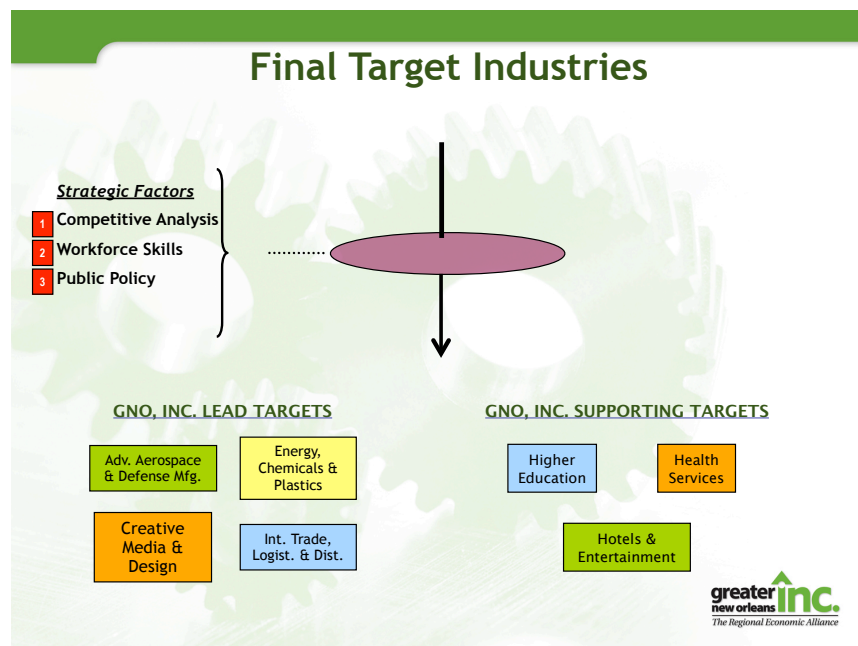
Provided market analysis of continued investment to Southwest Airlines to secure the addition of 9 new flights a day with 1,233 new seats inbound and outbound, representing a \$70 million investment.

Worked with iSeatz to relocate their headquarters back in New Orleans providing 25 high paying jobs to the region.

Worked with AT&T to find a location for their new call center which will provide nearly 200 new jobs to the region.

CALL TO ACTION: INVESTING IN REGIONAL ROADMAP FOR THE FUTURE

GNO, Inc. is laying the foundation for the future of the region. GNO, Inc. recognizes that the region’s long term economic vitality stands at a critical crossroad for which there is tremendous opportunity to accelerate in the right direction. The momentum for growth is here and the Greater New Orleans Roadmap for Economic Development directly makes the case for new investment for future growth. The Roadmap contains detailed business plans and attraction strategies for the four target industry sectors, (1) International Trade, Logistics, and Distribution, (2) Energy, Petrochemicals, and Plastics, (3) Advanced Aerospace and Defense Manufacturing, and (4) Creative Media and Design. This comprehensive strategy offers a coherent action plan for the 10 parish region to transform its economy for long term growth and wealth creation. It provides a clearly delineated two prong approach with GNO, Inc. leading external marketing and attraction primarily through the four target industry sectors while supporting parish level efforts among key locally serving industry sectors. The entire effort will be undertaken in collaboration with the state and local parishes and related economic development organizations through growing civic engagement at the local and regional levels. Furthermore, the effort will be enhanced by a myriad of other factors including new political leadership across all levels of government, a regional economy on the rebound, influx of young professionals drawn to helping reshape and rebuild the region, vast entrepreneurial activities as well as continued investment of rebuilding the regions infrastructure to name a few.



Growth within the four Target Industry Sectors is assured a higher degree of success through GNO, Inc.'s ability to marshal its resources in public policy advocacy and workforce solutions to address any impediments and needs identified in the comprehensive sector strategies working hand in glove with business development. While GNO, Inc. assumes its proper role in regional leadership with these four Target Industry Sectors, it will continue to provide equally strong assistance to all ten parishes in their retention and growth programs among locally serving target sectors.

The Greater New Orleans Roadmap for Economic Development represents a partnership rooted in clearly articulated development strategy offering an exciting opportunity for the Greater New Orleans 10 parish region to realize sustained, long term growth.

What The Roadmap Does....

- * **Builds** the best regional case for new investment and development in all ten parishes
- * **Provides** strong focus for GNO, Inc. in its use of resources and expertise
- * **Establishes** a clear vision for the role and relationship of GNO, Inc. and each parish economic development organization in a regional alliance
- * **Creates** strong synergy with external marketing of regional target industry sectors and internal support for locally serving target sectors
- * **Identifies** the top industry sectors based on critical local focus, strong regional fit, and an ample asset foundation
- * **Positions** the region and the parishes to aggressively move from what is possible to reality through measurable standards and benchmarks in five, ten, fifteen years and beyond increments

THE BOTTOM LINE...the Roadmap

Provides a clear, common sense growth and investment strategy for the region

Creates immediate and long term opportunities for economic development

Connects Parish and regional quality job and wealth enhancement plans

Assures sustained transformation of the region's economy to remain competitive

HOW DOES IT WORK?



What We Propose to Do: GNO, Inc. *forward*

***forward*: Business Development and Marketing: Strengthen Regional Economic Opportunities**

PROMOTE the ten parishes in Greater New Orleans to attract new business to the region.

MAXIMIZE business development, workforce and public policy staff resources to focus on overall strategy and vision and be especially proactive in identifying and recruiting prospects.

SOLICIT capital investment and new development creating job growth opportunities both nationally and internationally by implementing the Roadmap's marketing strategies.

CONDUCT strategic high-profile national and international business development missions over a five-year period aligning with the parishes and companion organizations.

IMPLEMENT a state-of-the-art regional marketing campaign and materials to promote Greater New Orleans and its ten parishes emphasizing strengths and assets in the post-Katrina era.

PRODUCE and distribute focused promotional prospectuses for the targeted industry sectors.

ENHANCE and grow powerful information tools including state of the art website and GIS site intelligence and mapping capabilities.

forward: Public Policy:

Enhance and Strengthen our Business Environment Through Appropriate Public Policy Initiatives and Activities

EXPAND focus on developing public policy agendas and activities relevant to ensure the successful implementation and integration of the Greater New Orleans Roadmap

COMMUNICATE in a consistent and compelling manner on why Public Policy is critically important and relevant to strengthening economic development foundations

LEAD as appropriate and collaborate on important issues of mutual concern for the region, particularly as they relate to the three legs of the stool; strengthen the region’s business climate to be increasingly competitive and attract more investment

BUILD on being entrusted to lead competitiveness issues throughout the region

forward: Workforce Development:

Attract, Retain and Grow a Globally Competitive Workforce

FOCUS on strengthening the educational system and the continuum of K-12 through Higher Education

ELEVATE the GNO, Inc. leadership role in coalescing regional workforce development services into a collaborative effort to avoid duplication and gain measurable impacts as they relate to the Greater New Orleans Roadmap

STRENGTHEN and Communicate the message that GNO, Inc. is the business voice for creating integrated workforce delivery systems responsive and relevant to business needs

ATTRACT workers needed to sustain and grow relevant industry targets and supporting targets

How Do We Fund GNO, Inc. forward?

PROGRAM FOCUS	CURRENT	PROPOSED
BUSINESS DEVELOPMENT	\$520,000	\$700,000
PUBLIC POLICY	\$200,000	\$250,000
WORKFORCE DEVELOPMENT	\$750,000	\$1,000,000
ROADMAP MARKETING	\$200,000	\$500,000
OPERATIONS / SUPPORT	\$130,000	\$250,000
TOTAL	\$1,800,000	\$2,700,000

GNO, Inc. LEADERSHIP

Mr. William A. Oliver
AT&T Louisiana

Mr. Martin A. Mayer
Stirling Properties, Inc.

Mr. James M. Hudson
OMNI BANK

Dr. Patrick J. Quinlan
Ochsner Health System

Mr. Howard Daigle
Daigle Fisse & Kessenich

Mr. Greg Rusovich
Transoceanic Shipping Co. Inc.

Mr. Conrad Appel III
Construction South

Ms. Lizette M. Terral
Chase Bank

Mr. Frank Glaviano
Shell Oil & Production

Dr. Timothy P. Ryan
University of New Orleans

Mr. Ashton J. Ryan Jr.
First NBC Bank

Mr. Steven C. Hemperley
Capital One

Mr. William Henry Shane Jr.
Favrot & Shane Companies

Mr. Taylor Beery
Frantzen Voelker Investments

Mr. John P. Manard Jr.
Phelps Dunbar LLP

Mr. Arnold B. Baker
Baker Ready Mix & Building Mat.

Mr. Gery J. Barry
Blue Cross and Blue Shield of LA

Mr. Ernesto Schweikert
KGLA Spanish Radio

Ms. Shelley MacNary
Entergy Louisiana

Mr. Steve Kuiper
Acadian Ambulance Service

Mr. Raymond Seamon
Louisiana Landscape Specialty, Inc.

Ms. Joan K. Mollohan, CPC, SPHR
Ochsner Health System

Dr. Charles C. Teamer, Sr.
Dryades Bank

Ms. Sandra M. Gunner
New Orleans Chamber of Commerce

Mr. Dale Benoit
Print All

Mr. Walter J. Leger Jr.
Leger & Shaw

Mr. Michael L. Gill
Farm Bureau Insurance

Mrs. Suzanne Mestayer
Regions Bank

Mr. John F. Little, III
International Matex Tank Terminals

Mr. Daniel R. Schaus
CLECO

Mr. Jean M. Champagne
Krebs, LaSalle, LeMieux Consultants Intl.

Dr. Randy Moffett
Southeastern Louisiana University

Honorable William H. Nungesser
Plaquemines Parish President

Mr. George Bucher
Coventry Healthcare of Louisiana

Ms. Leslie Jacobs
Strategic Comp

Mr. Sean C. Hunter
Louis Armstrong International Airport

Gen. David Mize (ret)
Apogen Technologies

Mr. William H. Hines
Jones Walkers

Ms. Miji Park
The Idea Village, Inc.

Mr. Woody Oge
Northrop Grumman Ship Systems

Ms. Jan Robert
St. Tammany Healthcare Alliance

Mr. Gary B. Silbert
Entergy New Orleans

Mr. Danny G. Shaw
Baker, Donelson, Bearman,
Caldwell & Berkowitz, PC

Mr. J. Stephen Perry
New Orleans Convention and
Visitors Bureau

Mr. Darryl d'Aquin
CommTech Ind.

Mr. Barry D. LeBlanc
Pamlab, LLC

Dr. Mark J. Peters
East Jefferson Gen. Hospital

Mr. Karl E. Hoefler
IBERIABANK

Mr. Robert J. Patrick
Seismic Exchange

Mr. Mark J. Spansel
Adams & Reese, LLP

Mr. Thomas Fierke
Lockheed Martin Michoud