

FUND FOR GULF COMMUNITIES
FINAL REPORT

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SUBMITTED BY:

AMY HOLMES
JAMES MCCLELLAND

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PROGRAM OVERVIEW AND KEY FINDINGS

For the past three years, Rockefeller Philanthropy Advisors has administered the Fund for Gulf Communities, a \$20 million initiative established by the donor with the goal of aiding people affected by the BP Oil Spill, increasing community resilience, and building stronger local philanthropic institutions across the Gulf Coast. The six regional partners selected to make grants in their local areas awarded a total of \$18 million to nonprofits that provide key services to help recover from the economic and psychological effects of the Oil Spill. These grants funded programs that help affected families access emergency food, avoid eviction and foreclosure, learn new skills and find jobs, manage their small businesses, gain financial literacy and budgeting skills, get counseling to alleviate stress and depression, and help children cope with difficult family situations.

Since the spring of 2011, the Fund has served over 800,000 people through 127 grants to local organizations. Our regional partners have shared numerous stories of families and communities that have been transformed and strengthened through this initiative. We have identified key factors that made this project a success, and share these lessons that we hope will be useful in future efforts to respond to an emergency and reach people in need across a region.

➤ **Support organizations that local people trust**

When seeking help after a disaster, people tend to go to local organizations they are already familiar with. The Fund for Gulf Communities was designed to bring needed resources to the community-based organizations that affected families trust, allowing these organizations to expand their programs and serve more people. However, these institutions may be unsophisticated and often have small staff and budgets. They might need help writing successful proposals, collecting data for reports, and improving internal operations. This approach is more effective than making grants to larger institutions, non-local organizations, or government agencies that lack strong relationships with affected families. Supporting small nonprofits requires more research to identify the right organizations, and more assistance through the life of the grant, but strengthens the community's most valued organizations and reach more people in need.

➤ **Separate emergency response grants from long-term recovery grants**

Once the regional partners were selected, RPA asked each partner to make a small number of grants right away to get services to affected people immediately, then take more time to allocate the remaining funds. The regional partners divided their grantmaking into two rounds, starting with immediate response grants to address the most pressing needs, supporting programs such as food pantries, emergency cash assistance, and counseling, and later grants designed to address long-term recovery. The later rounds focused on building community resiliency by helping affected people start careers in new industries, creating service networks among complementary nonprofits, and assisting key organizations to improve their operations and prepare for the next disaster. Some second-round grants supported newly-created partnerships between groups that found innovative ways to work together to help affected populations.

➤ **Encourage grantee organizations to learn from each other**

All the regional partners noted the benefits of bringing their grantees together for regular convenings. The purpose of initial convenings was often training on gathering data required for reports, but just by having a group of nonprofit leaders in the same room, they witnessed many new connections made between similar organizations that serve the same populations but had never

worked together before. Most of the regional partners quickly realized the value of regular meetings for all their grantees, and helped to foster both formal partnerships and informal learning conversations to encourage service providers to develop peer networks, refer clients to each other, and launch new initiatives together. The importance of grantee networking opportunities is a lesson we all learned through this project.

➤ **Allocate some funding for technical assistance**

After the regional partners selected their grantees and started monitoring the funded programs, they noticed some organizations lacked strong internal systems and management skills. Groups that serve hard-to-reach populations and communities most directly impacted by the BP Oil Spill were often the same groups that struggled with data collection, financial operations, and fundraising. RPA subsidized technical assistance workshops for each regional partner's grantees, contributing \$12,700 for the training sessions. Workshops in topics such as fundraising and board governance addressed common needs among grantees across the region. Several regional partners instituted their own series of capacity-building classes for their grantees, and all recognized the need for ongoing training in management skills for organizations in their communities.

STORIES FROM OUR PARTNERS

Through our ongoing communications with the regional partners and site visits to select grantees, we have witnessed the positive, lasting impact of this initiative on communities affected by the Oil Spill. We are pleased to share the stories of families whose lives were changed by this project and the development of the community foundations that facilitated the Fund for Gulf Communities in their states.

GREATER NEW ORLEANS FOUNDATION (Louisiana)

As the largest and most established of the regional partners, the Greater New Orleans Foundation's (GNOF) Fund for Gulf Communities catchment area included the populated New Orleans metropolitan region and the sparsely inhabited coastal communities south of the city. GNOF granted more than \$4.5 million to 21 organizations, which served over 350,000 individuals.

Impact on the Community

With GNOF's significant grant pool, the foundation supported a variety of organizations and projects, from community art programs to job re-training courses following the Oil Spill. Although the foundation's grants covered a large geographical area, staff worked to link these organizations into a cohesive group, where they could share experiences and support one another. GNOF hosted multiple grantee gatherings and conference calls in order to create this sense of community and train staff on best nonprofit management practices. This created new connections between organizations that previously were unaware of each other, even when they were located in the same town or worked with similar populations. These efforts proved fruitful when Hurricane Isaac made landfall in 2012 and organizations were able to work together to better serve those in need.

A key objective of this project was to improve the **Financial Stability** of individuals affected by the Spill. As one example, *Bayou Interfaith Shared Community Organizing* (BISCO) provided financial literacy trainings for individuals in the hard-hit seafood industries of Terrebonne and Lafourche Parishes. The organization offered business skills courses to fishermen, crabbers, and shrimpers who had been unable to work when waters were closed to fishing. These trainings included topics such as budgeting, marketing, and small-business management.

Many communities also suffered emotional stress that went beyond the temporary loss of a job or a closed beach. In response, regional partners made grants to **Community Wellness** programs, especially those supporting **Youth Resiliency**, that would catalyze the healing process. One grantee, the *Houma Regional Arts Council* (HRAC), worked with local organizations to offer youth arts programming that engaged children whose lives were turned upside down by the Oil Spill. In six parishes HRAC both ran sessions and supported community groups with programs at schools, neighborhood centers, churches, and other institutions helping children express themselves through art and learn to cope with anxiety and upheavals at home.

Foundation Growth & Development

Participating in the Fund for Gulf Communities allowed GNOF to grow in several ways. First, staff members deepened their knowledge of the region's needs, especially in rural areas outside of New Orleans. In addition, as outlined above, the foundation offered meaningful technical support and assistance to its grantees, creating a more interconnected nonprofit community.

GNOF's evolution has also been defined by its burgeoning leadership role among the other Fund for Gulf Communities partners. With a large experienced staff, GNOF could share its knowledge and expertise with the other community foundations. Specifically, Vice President for Operational Effectiveness Joann Ricci, who brings years of experience helping organizations improve their operations, worked closely with the other regional partners and provided trainings for their grantees. In the future, we hope GNOF will build upon its experience, continue its first among equals role with other community foundations on the Gulf Coast, and ultimately create a more resilient region.

COMMUNITY FOUNDATION OF ACADIANA (Louisiana)

Our westernmost regional partner, the Community Foundation of Acadiana (CFA) in Lafayette, awarded more than \$2.7 million through 18 grants, serving over 50,000 people, in seven parishes along the central Louisiana coast.

Impact on the Community

The Fund for Gulf Communities provided CFA the opportunity to oversee a large grant program led and managed by the staff— a major first for the foundation, which had little previous experience with proactive grantmaking. Through its **Health Services** grants, CFA funded emergency and urgent care services for communities impacted by the Oil Spill. In fact, in the Spill's aftermath, many health care providers reported a significant increase in the numbers of patients, especially those who were unemployed and uninsured. CFA responded with a series of grants to organizations like the *Franklin Foundation Hospital*, a small community facility in St. Mary's Parish. The grant helped offset Franklin's increased emergency room costs, which were causing financial strain on the hospital. The grant also supported upgrades to the internal ER operations and customer service protocol, allowing the hospital to significantly improve its productivity and financial position, and ultimately resulting in higher patient satisfaction and clinical outcomes.

When the Spill shutdown much of the oil and fishing industries, many people were out of work causing uncertainty and economic distress. The region's food banks felt the brunt of the crisis, with many experiencing a spike in demand. **Emergency Assistance** grants brought relief for organizations responding to this growing need. CFA's grant to *Liberty Heights Giving Grace Gardens* allowed the organization to offer fresh food supplies through its pantry and community garden to the mostly rural residents of St. Martin Parish. Liberty Heights also hired additional staff and expanded its reach, partnering with the state to launch a new summer youth feeding program. Likewise, the organization enrolled in a sustainable farming initiative with Southern University and is establishing a local produce co-op. This will help provide affordable foods for communities affected by the Oil Spill for years to come.

Foundation Growth & Development

The Fund for Gulf Communities presented a unique challenge and opportunity for the Community Foundation of Acadiana. Although it had some experience overseeing grant programs, this project required new levels of research, community knowledge, and engagement from the foundation staff. To meet this challenge, CFA brought on a new Chief Operations Officer to monitor the foundation's day-to-day activities, and hired Trish Olivier to manage CFA's grant operations. Trish's experience working in the community and commitment to executing first-rate grants helped to ensure that the project's funds reached its target populations.

Trish is especially skilled at identifying organizations that delivered strong programs, but needed extra help with operations, such as data collection or financial management. She was an effective coach and mentor for these organizations, working closely with them over the life of this project to make sure positive impact was captured and documented. Her work helped strengthen the local nonprofit sector and established the Foundation as a valued leader in the community.

The addition of key new staff members like Trish, plus the experience of running a multi-million dollar, multi-year competitive grant program, CFA has come a long way. It is now well positioned to build on this experience and provide high-quality philanthropic services to central Louisiana.

GULF COAST COMMUNITY FOUNDATION (Mississippi)

The Gulf Coast Community Foundation (GCCF) made grants to organizations across three coastal counties in Mississippi. The Foundation issued more than 30 grants totaling nearly \$3.7 million that provided services for over 135,000 individuals.

Impact on the Community

Similar to other regions, the hospitality and seafood industries in coastal Mississippi struggled in the wake of the Oil Spill. GCCF grants focused on helping these industries recovery, along with providing basic support services that assisted a community struggling to get back on its feet.

In addition to the employment and health programs highlighted in previous reports, GCCF awarded a set of **Workforce Training** grants to help individuals develop new job skill and find employment. This included support for the *Digital Opportunity Trust's* (DOT) TeachUp! project which reached over 2,000 clients. These residents were unemployed or under-employed because of the Oil Spill, and were trained in valuable computer technology skills. DOT helped graduates locate better paying jobs utilizing their new skills. The grant from the Community Foundation leveraged a grant of over \$1 million from the Mississippi Department of Employment Security to support TeachUp!

GCCF's grant to *Habitat for Humanity's* Invest in Yourself program funded **Financial Stability** courses for individuals directly impacted by the Spill. The course offerings included a series of group education classes and individualized coaching sessions designed to help clients work towards their personal financial goals. The topics included courses on basic banking and money management, the importance of credit scores, savings strategies and debt reduction, among other issues. Habitat for Humanity targeted these trainings on priority populations – those whose livelihoods were affected by the Deepwater Horizon accident – serving nearly 175 clients with over 1,400 hours of financial literacy instruction.

Foundation Growth & Development

Participating in the Fund for Gulf Communities allowed the foundation to develop its internal expertise and elevate its profile. In fact, GCCF is now in the process of re-evaluating its role, expanding its mission beyond that of a funder to include being a vital community convener and nonprofit leader.

As part of this evolution, GCCF developed a comprehensive training program for its grantees. This included paying for training sessions through the Mississippi Center for Nonprofits and one-day courses with the Greater New Orleans Foundation, and one-on-one counseling and mentoring advice from Foundation staff. For small nonprofits, with only a few paid staff members or volunteers helping out, this personalized support from a prominent local funder can transform the organization and make their operations more effective.

GCCF's participation in this project also allowed the foundation to attract other funding opportunities. This included a \$350,000 emergency response granting from Chevron following Hurricane Isaac in 2012. Similarly, GCCF received a \$400,000 grant from the Baton Rouge Area Foundation as part of a region-wide response to Isaac. In both cases, GCCF's experience and professionalism gained through this initiative were critical factors in attracting grants from new funders, who felt confident their resources would be well managed to help communities affected by the Hurricane.

COMMUNITY FOUNDATION OF SOUTH ALABAMA (Alabama)

The Community Foundation of South Alabama is located in Mobile, and received \$4 million to allocate to organizations in coastal Alabama. The Foundation awarded \$3.6 million to 28 organizations, which have served over 120,000 people affected by the Oil Spill.

Impact on the Community

The Community Foundation was especially successful in identifying grantees that reach underserved populations, such as rural, Asian, Hispanic, and non-English speaking residents, which were often the same communities that were most significantly affected by the Oil Spill. After noticing the connections grantees made with each other at their first convening, they instituted a series of regular gatherings so organizations could share program ideas and outreach strategies, and work together to meet the needs of the community. Five technical assistance workshops on issues like evaluation, board governance, fundraising, and advocacy extended the value of the grants, making grantee organizations stronger and more effective.

Through its **Financial Stability** grants, affected population who face language barriers were aided with financial literacy and entrepreneurial skills training that allowed them to access job opportunities and new business partnerships. One grantee in this area, *Baldwin Family Violence Shelter*, aided clients seeking shelter from abusive spouses, who were often also out of work because of the Oil Spill, to find full-time employment and live independently and safely.

Youth Resiliency programs can be most effective when they engage young people to play an active role in their own recovery and become contributors to their community. In a successful partnership between grantee *Boat People SOS*, youth whose families rely on the coast for their livelihoods, were engaged as volunteers to rebuild oyster reefs destroyed by the Oil Spill and other disasters in collaboration with the Alabama Coastal Foundation.

Foundation Growth & Development

At the start of this initiative, the Foundation's board hired a new Executive Director, Alvertha Penny, who has an ambitious vision for the role the Foundation plays as a leader in the philanthropic community. The Foundation has also adopted a more strategic, impact-oriented approach to its grantmaking as a result of the success of the Fund for Gulf Communities, making larger grants on average and investing in the long-term development of the nonprofit sector.

Through this project, the Foundation recognized the need for capacity building in local nonprofits. While many nonprofits provide good services, they often suffer from weak infrastructure and lack of management skills. The Foundation also sought to improve its relationship with the nonprofit sector, and make the Foundation more approachable and accessible to potential grantees. As a result, technical assistance is now integrated into all its grants, and offered to all nonprofits in the area. These training workshops will improve the performance of local organizations in the long term, and establish the Foundation as a knowledgeable and trusted resource for nonprofit excellence.

The Foundation has leveraged nearly \$500,000 in new grant funding as a result of its work with the Fund for Gulf Communities. In the coming months, they will publish an assessment of the overall impact of the initiative, which will raise their profile and solidify their strong reputation.

CATHOLIC CHARITIES OF NORTHWEST FLORIDA (Florida)

Although not a traditional grantmaking institution, Catholic Charities was the larger of our two regional partners in the Florida panhandle. Catholic Charities received \$3.5 million to allocate to organizations in the seven counties of the panhandle, and allocated \$3.17 million to 23 grantees. The organization itself was allocated \$825,000 to support its own programs, which provided emergency financial assistance, workforce development, and financial management programs to people affected by the Oil Spill. In total, 134,000 people affected by the Oil Spill were reached through Catholic Charities' grantmaking and its own programs.

Impact on the Community

Although only a small portion of the panhandle coast saw oil on its shores, the long-term economic effect of the BP Oil Spill is still being felt, especially by people who had low-wage jobs in the tourism, fishing, and service industries. As tourism dropped and local businesses closed, unemployment increased dramatically, resulting in foreclosures, evictions, homelessness, and mental health problems. Although tourism has since rebounded, many local businesses never reopened, and living wage jobs are still hard to come by for many unskilled workers.

A **Job Skills Training** grant to *Pensacola State College*, a community college with extensive workforce certification, English as a Second Language, and GED classes, reached about 1,000 students. Many adult education students whose livelihoods had been disrupted by the Oil Spill could not afford the \$30 per class tuition, so financial aid allowed needy students to learn a new trade, get a high-school equivalent credential, and find employment. The impact of this grant reaches far beyond this project, as students with workforce certifications can move out of unstable service jobs and into more stable careers.

A **Youth Resiliency** grant to *Opportunity Place* in Okaloosa County allowed this transitional housing organization to hire a Children's Services Coordinator, who organized tutors, mental health counseling, and healthy food for the children of families who lost their income and ultimately their homes as a result of the Oil Spill. Because of the success of this new service for children, local philanthropy is supporting the Coordinator after the Fund for Gulf Communities grant ended.

And in *Catholic Charities'* own portfolio of **Emergency Assistance** programs, a new mobile food pantry was launched in the Fort Walton office that provides food in the rural, remote areas of its nearby counties. Many tourism workers live miles inland where the cost of living is lower, and when their jobs ended due to the Oil Spill, found themselves isolated from services and help. A case worker on the mobile pantry helps clients sign up for SNAP (food stamps) and other programs to sustain and help them get back on their feet.

Growth & Development of the Organization

Although Catholic Charities does not intend to continue its grantmaking function, the organization grew substantially as a result of its facilitation of the Fund for Gulf Communities. The staff doubled in size, and services expanded to include mental health counseling and job development. Emergency assistance initiatives also expanded to allow Catholic Charities to prevent evictions, where before they could offer only short-term financial help. These programs have helped clients recover in meaningful and lasting ways, and have made Catholic Charities a more comprehensive service provider for the entire Florida panhandle.

COMMUNITY FOUNDATION OF NORTHWEST FLORIDA (Florida)

The Community Foundation was a very small institution when this project began, with limited grantmaking experience and a presence restricted to Escambia and Santa Rosa Counties. Because of its small size and modest footprint, the Foundation received \$500,000 and allocated seven grants totaling \$296,350. These grants reached 4,700 people affected by the BP Oil Spill. In addition, the Foundation used \$203,650 to build its own infrastructure, launch a donor education campaign about the role of community foundations, and expand its own board.

Impact on the Community

Because the Community Foundation's grantmaking budget was modest in size, the grants awarded were also relatively small, ranging from \$30,000-50,000. However, meaningful impact was created by supporting some of the area's most valued organizations that people affected by the Oil Spill first turn to for help.

A **Youth Resiliency** grant to *Milk and Honey* helped to provide a safe and welcoming after-school program for low-income children in Pensacola, impacted by financial instability and family loss of income. The organization had lost other funding due to the depressed local economy and was in danger of closing. This grant allowed it to continue operations through the most difficult years after the Oil Spill.

The **Mental Health Services** at *Lakeview Center* were enhanced through a grant to build a playground for youth having trouble coping with family anxiety and economic problems. Recreation and therapeutic play is of great benefit to children facing disruptions at home brought about by their parents' unemployment and financial strain.

Foundation Growth & Development

When this project began in 2011, the Community Foundation served only Escambia County, and all of its board members were from Pensacola. With a new resolution to expand its footprint to include the entire Florida panhandle through Panama City, the Foundation has recruited new board members from Santa Rosa County. This year, they will welcome two additional board members from Okaloosa County, further to the West. They created a new website, logo, and other marketing materials to reflect the organization's new name (the original name was Greater Escambia Community Foundation) as well as the Foundation's first ever annual report to promote the Foundation's impact on the community to current and prospective donors.

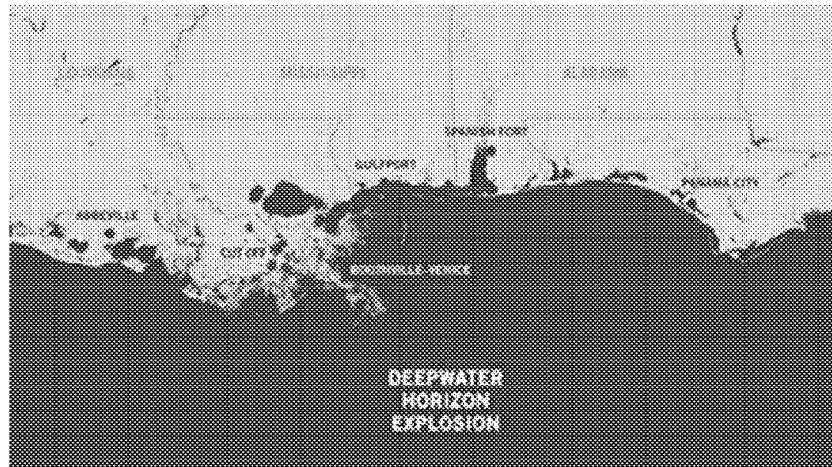
The Foundation's executive director reviewed all their operations and adopted best practices in management, procedures, and governance. As a result, the Foundation was certified by the Community Foundation National Standards Board, the group within the Council on Foundations that oversees sound practices at community foundations.

The Executive Director's efforts to educate the community and local donors about the function and benefits of supporting the Community Foundation have resulted in new contributions: they received a gift of \$500,000 from the estate of a local philanthropist, and three new donor-advised funds have been established. Though it is still a small operation with a modest endowment and grantmaking budget, the Community Foundation is using the positive momentum generated by this initiative to lead the nonprofit sector and continue the cultivation of local philanthropy.

ROCKEFELLER PHILANTHROPY ADVISORS: ROLES AND REFLECTIONS

Rockefeller Philanthropy Advisors is grateful for the opportunity to house and facilitate the Fund for Gulf Communities, and is pleased with the project's success. As the Fund comes to a close, we reflect on the roles we played to ensure the responsible stewardship of the donor's contribution. Our experience in managing large grantmaking initiatives allowed us to advise and mentor our regional partners, who possessed an understanding of their community's needs, though needed guidance in implementation. Here are highlights of the roles RPA played through this initiative:

- Created the project's mission and objectives, with materials for consistent communication with prospective grantees and the media across the four-state region
- Developed standardized grant reporting processes and data collection tools
- Hosted three convenings with the regional partners to plan the launch of the initiative, share best practices and lessons learned during the grantmaking process, and to strategize for ongoing collaboration and region-wide donor cultivation
- Visited selected grantee organizations during eight site visits to the region to monitor program delivery and ensure quality
- Managed and subsidized a series of capacity-building workshops for each partner's grantees in topics such as fundraising and board development that extended the value of the grants
- Counseled regional partners through oversight of their grantees, helping them restructure grants as community needs changed, or troubleshoot unexpected challenges
- Created a project video that captures the stories of the people affected by the BP Oil Spill and how their lives were changed by programs funded by this initiative (see below).



The video highlights six examples of grantees and their programs that reached people in need and helped them get back on their feet. We hope you enjoy seeing first-hand accounts of how the Fund for Gulf Communities has aided individuals across the region in their recovery.

Watch the video at http://youtu.be/6m_v_UtPEI.