Proposal Overview Form

The Proposal Overview Form is part of the Part 1 Eligibility Determination & Threshold for Evaluation and should be submitted via the Fluid Review portal. Submitted documentation should include only the information requested below, saved in a single PDF file.

Non-Profit Information			
Name of Nonprofit Applicant (as registered with Louisiana Secretary of State)	Crescent City Schools		
Application Type	**Type 1** [x]	**Type 3** [ ]	
Instruction Location. Mark whether instruction will be will be primarily **site based** (in person, in a school building) or **virtual** (computer based).	**Site Based** [x]	**Virtual** [ ]	
If a Type 1 Applicant, please select your proposal type	**New Start** [ ]	**Transformation – Full Takeover** [x]	**Transformation – Reconfiguration** [ ]
Operator Track		**New Operator** [ ]	**Experienced Operator** [x]

Primary Contact Information	
Name	Kate Mehok
Address	3811 North Galvez Street, New Orleans, LA 70117
Phone	(504) 451-7330
Email	kmehok@crescentcityschools.org

School Leader Information	
Proposed school leader name (if identified)	
Proposed school leader current job/position	
List any principal/leadership programs the proposed leader is currently enrolled in or have completed (e.g., NLNS, BES, etc.)	

School Information	
Proposed School Names	CCS4, CCS5
Opening Years	2020-2021 (CCS4), 2021-2022 (CCS5)
Grades served Year 1	PreK-8 (CCS4), PreK-8 (CCS5)
Grades served at capacity	PreK-8 (CCS4), PreK-8 (CCS5)

Enrollment Projection Form

Provide the following information for each school included in this proposal. Specify the planned year of opening for each (duplicating the table as needed).

School 1 Name:	CCS4
Pursuant to OPSB Policy HA, Section 6, will your school have any proposed Focus Programs or Mission-Specific Admissions Preferences?	N/A

Grade Level	Number of Students					
	Year 1: 2020-2021	**Year 2:** 2021-2022	**Year 3:** 2022-2023	**Year 4:** 2023-2024	**Year 5:** 2024-2025	**Year 6:** 2025-2026
Pre-K	40	40	40	40	40	40
K	60	60	60	60	60	60
1	60	60	60	60	60	60
2	60	60	60	60	60	60
3	60	60	60	60	60	60
4	60	60	60	60	60	60
5	60	60	60	60	60	60
6	60	60	60	60	60	60
7	60	60	60	60	60	60
8	60	60	60	60	60	60
9						
10						
11						
12						
MINIMUM ENROLLMENT	540	540	540	540	540	540
BUDGETED ENROLLMENT	540	540	540	540	540	540
MAXIMUM ENROLLMENT	580	580	580	580	580	580

Enrollment Projection Form

Provide the following information for each school included in this proposal. Specify the planned year of opening for each (duplicating the table as needed).

School 2 Name:	CCS5
Pursuant to OPSB Policy HA, Section 6, will your school have any proposed Focus Programs or Mission-Specific Admissions Preferences?	N/A

Grade Level	Number of Students					
	Year 1: 2021-2022	**Year 2:** 2022-2023	**Year 3:** 2023-2024	**Year 4:** 2024-2025	**Year 5:** 2025-2026	**Year 6:** 2026-2027
Pre-K	40	40	40	40	40	40
K	60	60	60	60	60	60
1	60	60	60	60	60	60
2	60	60	60	60	60	60
3	60	60	60	60	60	60
4	60	60	60	60	60	60
5	60	60	60	60	60	60
6	60	60	60	60	60	60
7	60	60	60	60	60	60
8	60	60	60	60	60	60
9						
10						
11						
12						
MINIMUM ENROLLMENT	540	540	540	540	540	540
BUDGETED ENROLLMENT	540	540	540	540	540	540
MAXIMUM ENROLLMENT	580	580	580	580	580	580

Enrollment Plans

What is your minimum operating enrollment? What adjustments to the budget, staffing and/or academic model would be made to accommodate this minimum enrollment?

CCS intends to operate 2 "Transformation - Full Takeover" schools and will ultimately build budgets and staffing models that accommodate the entire student enrollment at the schools that we transform. For purposes of creating a budget for this application, we are assuming an enrollment of 540 - two sections of thirty students each in grades K-8. Although CCS intends to operate a PreK program at each school, since this is a separate process administered by LDOE and NOEEN, we have not included those students in our minimum enrollment. We feel confident that we will be able to build a budget and staffing model to accommodate whatever size schools we are selected to transform. We have experience operating financially viable schools ranging in size from 393 students to 909 students.

School Management Form

Do any of the following describe your organization or any of the school(s) proposed in this application?

☐ Will contract or partner with an education service provider (ESP) or other organization to provide school management services.

If so, identify the provider: _____

☐ Will have a corporate partner as defined in LA R.S. 17.3991.1.

If so, identify the partner: _____

☐ Will reflect the conversion of an existing public school (Type 3 application).

If so, identify the school: _____

☒ The applicant has previously participated in the OPSB charter RFA process.

If so, is the application currently on appeal to the State? N/A

☒ Already operates schools in Louisiana or elsewhere in the US (indicate which state(s) below)

Certification

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate. I recognize that any misrepresentation could result in disqualification from the application process or revocation afterward. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the organization.

K. Mehok — 2/4/19

Signature of Application Primary Contact — **Date**

Kate Mehok, CEO

Print Name & Title of Application Primary Contact

Assurances Form

Please review the statements below and indicate whether each is true, and will hold true if the application is approved. *If the answer to any item above is "No", please submit a statement of explanation.*

	Yes	No
1. The school and/or governing organization is currently registered as a nonprofit and is listed as in good standing with the Louisiana Secretary of State	✓	
2. The school is not affiliated with any religious organization and does not support nor engage in any religious activities	✓	
3. The school and/or governing organization does not have any liens, litigation history and/or sanctions from any local, state and/or federal regulatory agency against the nonprofit corporation	✓	
4. The school and/or governing organization does not have the same or substantially the same board of directors and/or officers as an existing private school	✓	
5. The school does not draw a substantial portion of the employees from an existing private school	✓	
6. The school does not receive a substantial portion of assets or property from an existing private school	✓	
7. Will your school seek approval to operate within OPSB's LEA for federal funding and compliance purposes?		✓
8. The school is not located at the same site as an existing private school	✓	
9. The school will participate in the city-wide common enrollment (OneApp) process	✓	
10. The school will participate in the city-wide common expulsion process	✓	
11. The school will provide free transportation to students as stipulated in OPSB Policy HA	✓	

Certification

I certify that I have the authority to submit this application and that all information contained herein is complete and accurate, realizing that any misrepresentation could result in disqualification from the application process or revocations after award.

Bob Stefani

Name of Board Chair, Charter Governing Board

Signature of Board Chair

2/4/19

Date

Statement of Explanation

Assurance 7. Will your school seek approval to operate within OPSB's LEA for federal funding and compliance purposes?

No. Crescent City Schools already operates 3 charter schools in New Orleans that are each their own LEAs. It plans to continue to operate each of its charter schools as their own LEA.

Teacher Eligibility Form

Louisiana state law requires that all groups submitting charter applications involve a minimum of three Louisiana teachers certified by the State Board of Elementary and Secondary Education in the development of their application.

Please use this form to identify the certified teachers participating in the development of this application.
Also, please be sure to include a copy of current LA Teacher Certifications for the teachers listed.

	Name	Street Address	ZIP Code	Phone	Email
1	George Werres	1470 Harrison Avenue, New Orleans, LA	70122	(812) 219-5723	gwerres@crescentcityschools.org
2	Charlie DePietro	4323 Carondelet Street, New Orleans, LA	70115	(914) 462- 2059	cdepietro@crescentcityschools.org
3	Ashley Lownik	2601 Eton Street, New Orleans, LA	70131	(262) 689- 4016	alownik@crescentcityschools.org

State of Louisiana

State Department of Education

Certificate Type	NUMBER	VALID
TEACHING CERTIFICATE	LEVEL 2 555152	12/28/2015 - 12/28/2020

Certificate Issued To:

GEORGE EARL WERRES, III

By the Louisiana Department of Education, based upon the following:

B.S., OUT-OF-STATE COLLEGE OR UNIVERSITY, 2003

M.S., OUT-OF-STATE COLLEGE OR UNIVERSITY, 2010

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

ELEMENTARY GRADES 1-8, 02/25/2010

For renewal of this certificate, individuals must successfully meet the standards of effectiveness for at least three years during the five-year initial or renewal period pursuant to LA R.S. 17:3886.

, 12/28/2015

Dr. Gary Jones **John White**

2/4/2019 10:01:40 AM

State of Louisiana

State Department of Education

Certificate Type	NUMBER	VALID
TEACHING CERTIFICATE	LEVEL 2 580046	12/11/2017 - 12/11/2022

Certificate Issued To:

CHARLES MATTHEW DEPIETRO

By the Louisiana Department of Education, based upon the following:

B.A., OUT-OF-STATE COLLEGE OR UNIVERSITY, 2010

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

MATHEMATICS 6-12, 01/22/2014

For renewal of this certificate, individuals must successfully meet the standards of effectiveness for at least three years during the five-year initial or renewal period pursuant to LA R.S. 17:3886.

, 12/11/2017

Dr. Gary Jones **John White**

2/4/2019 10:23:51 AM

State of Louisiana

State Department of Education

Certificate Type	NUMBER	VALID
TEACHING CERTIFICATE	LEVEL 1 558223	05/25/2016 - 05/25/2019

Certificate Issued To:

ASHLEY NICOLE LOWNIK

By the Louisiana Department of Education, based upon the following:

B.S., OUT-OF-STATE COLLEGE OR UNIVERSITY, 2010

ELIGIBILITY: The holder of this certificate is eligible for the following area(s) and/or terms:

MIDDLE GRADES 4-8, 07/29/2013

MIDDLE SCHOOL: ENGLISH/LANGUAGE ARTS 4-8, 07/29/2013

MIDDLE SCHOOL: SCIENCE 4-8, 07/29/2013

ELEMENTARY GRADES 1-8, 06/02/2015

To receive a Level 2 certificate, individuals must successfully meet the standards of effectiveness for three years pursuant to LA R.S. 17:3886., 05/25/2016

Dr. Gary Jones **John White**

Board Member Roster

Please list all the proposed board members for the non-profit applying to open this school. In order to be eligible to apply, applicants are required to have at least three board members. In order to be eligible for final Board approval, applicants are required to have five board members. State law requires a minimum of seven board members in order to execute a valid charter agreement, and at all times that a charter school is operational.

- **Resumes**: Please include a current resume for all board members identified
- **Background Checks**: All New Operators and Experienced Operators *not* currently operating a charter school in Louisiana must submit LA State Background checks for each board member identified by February 6, 2019.

Name of Non-Profit Applicant (as registered with Louisiana Secretary of State)	Crescent City Schools

	Name	Street Address	Zip-code	Phone	Email	Expertise[1]
1	Chris Dufour	728 Moss Street, New Orleans, LA	70119	(504) 388-2940	christopher.dufour@crescentcityschools.org	Finance
2	Paul Frantz	370 Park Road, Metairie, LA	70005	(504) 400-2805	paul.frantz@crescentcityschools.org	Education
3	Lakeisha Green	1841 Odeon Street, New Orleans, LA	70114	(504) 400-7042	lakeisha.green@crescentcityschools.org	Finance, community development
4	Doug Harrell	3690 Plymouth Place, New Orleans, LA	70131	(504) 393-8502	doug.harrell@crescentcityschools.org	Finance
5	Jean Paul Hymel	415 Fairway, New Orleans, LA	70124	(504) 460-1702	jp.hymel@crescentcityschools.org	Organizational operations
6	Julius Kimbrough, Jr.	1798 Rosiere Street, New Orleans, LA	70119	(504) 390-9102	julius.kimbrough@crescentcityschools.org	Facilities/real estate
7	Derrick O. Martin	3708 Post Oak Drive, New Orleans, LA	70131	(504) 505-0358	derrick.martin@crescentcityschools.org	Facilities/real estate, community development
8	Frank Rabalais	4418 Painters Street, New Orleans, LA	70122	(504) 495-4060	frank.rabalais@crescentcityschools.org	Facilities/real estate
9	Danielle Smith	1511 Iberville Street, Apt. 101, New Orleans, LA	70112	(504) 905-0475	danielle.smith@crescentcityschools.org	Organizational operations
10	Bob Stefani	515 Sena Drive, Metairie, LA	70005	(504) 388-9585	bob.stefani@crescentcityschools.org	Law
11	Morgan Williams	708 Valence Street, New Orleans, LA	70115	(202) 486-2776	morgan.williams@crescentcityschools.org	Law
12						
13						
14						
15						

[1] Board members should have a diversity of professional skills and expertise in areas including education, organizational operations, community development, finance, law and facilities/real estate.

Christopher A. Dufour

chris@gtenvfin.com - ***(w) 512 342 2711 (m) 504 388 2940***

QUALIFICATIONS PROFILE

15 + years in the Environmental Markets with a focus in advisory, marketing, and monetization of environmental assets. Proven track record in maximizing value for clients by analyzing relative value between multiple markets, and structuring transactions to take advantage of arbitrage opportunities. Experience, depth of knowledge, and contacts in both European and US-based renewable energy and carbon markets.

RELEVANT MARKET EXPERIENCE

GT ENVIRONMENTAL FINANCE, LLC – Austin, TX (Previously GT ENERGY, LLC)

Principal (2002 to Present)

GT Environmental Finance, LLC is an environmental market service provider, specializing in the field of sustainable development. Our firm provides clients project development solutions and advisory services to maximize the potential return from the monetization of environmental attributes. Our services include full service brokerage, aggregation and marketing services for all actively traded US Renewable Portfolio Standard compliance markets, as well as the US Voluntary Carbon and REC markets. The company has provided turnkey project development and marketing for several Climate Action Reserve (CAR) Greenhouse gas reduction projects. GT also provides advisory and brokerage services for biogas and clean fuel producers in the nascent green fuel markets e.g. RFS 2, LCFS et al, and is registered as an Introductory Broker with the National Futures Association.

GT ENERGY LIMITED / GT DERIVATIVES LIMITED – London, England

Vice President (2000 -2002)

Assisted in establishing GT's environmental desk into one of the leading Renewable Energy and Carbon brokerage desks in Europe. Arranged over 3 TWh of renewable energy deals in the Netherlands and UK markets within 24 months. GT facilitated over 25MM metric tonnes of carbon transactions from 2001 – 2005.

ADVISORY

American Community Renewable Energy Fund (AMCREF) - Advisory Board Member / Investment Committee Board Member – AMCREF is a $200 Million New Market Tax Credit (NMTC) Fund. Advised fund on prospective environmental attributes from projects in the vetting stage.

EDUCATION

SOUTHEASTERN LOUISIANA UNIVERSITY, HISTORY, BA

UNIVERSITY OF KENT AT CANTERBURY - INTERNATIONAL RELATIONS, MA

LICENSES

NFA SERIES 3, SERIES 30

Paul William Frantz
370 Park Road, Metairie, LA 70005
Work: (504)849-3158 Cell: (504)400-2805
Email: paul_frantz@mpcds.com

Educational Experience

Metairie Park Country Day School, a coeducational independent school PS-12 — Metairie, Louisiana

2012 – Present — **Middle School Principal:** responsible for the administration of program for 180 students and 30 faculty grades 6-8. Created 1:1 tablet program, developing service learning initiatives such as LSU's Coastal Roots Program, created new academic schedule, developing design thinking and programming initiatives through science curriculum, interdisciplinary projects and Level Up Village.

Berkshire Country Day School, a coeducational independent school PS - 9 — Lenox, Massachusetts

1999 – 2012 — **Associate Head of School:** oversaw all aspects of the pre-kindergarten through grade 8 campus of approximately 200 students and 30 faculty and staff including, building and grounds, after school and summer programs. Accepted the responsibilities of the Head of School in his absence. Created a weeklong program in the Florida Everglades for the 8th grade science program (1995). Coached alpine ski team and lacrosse.

1994 – 1999 — **Division Head:** supervision of students and faculty in the Upper School (grades 7-9). Oversight of social/emotional wellbeing of students including development and implementation of human development program, charged with establishing a vision, character and spirit of the Upper School.

1990 – 2012 — **Teacher and Coach:** taught Middle and Upper School mathematics (grades 4-9), coach alpine ski team and boys lacrosse. Eighth Grade homeroom teacher and advisor (1990 – 1999).

The Learning Center School, a coeducational independent school — Charlottesville, Virginia

1987 – 1990 — **Head of School:** responsible for the administration of school program for children, ages 6 – 12 with dyslexia, including budget preparation, advertising, curriculum development, hiring, enrollment and faculty training and supervision.

The Landmark School, a coeducational independent residential school — Manchester-by-the-Sea, Massachusetts

1985 – 1987 — **Teacher and Residential Coordinator:** taught mathematics and reading specialist for students with dyslexia. Directed staff in residential duty. Responsible for programming activities, budgets, building, transportation, safety and staffing.

The Kildonan School, an independent residential school for boys — Amenia, New York

1983 – 1985 — **Teacher, Coach and Dorm Head:** taught mathematics, language arts and literature to students with dyslexia. Dorm head supervising 20 boys. Coached soccer, cross-country running, lacrosse and skiing.

Education

2008-2010	American International College, Springfield, MA	M.Ed. Moderate Disabilities: PK through Grade 8
1979 – 1983	University of Virginia, Charlottesville, VA	B.A. Psychology and Religious Studies

Related Experience

1989 Presenter at the Virginia Branch of the National Orton Dyslexia Society Conference "Growing Up Dyslexic: What Parents Need to Know"
1992 Presenter at the ACA New England Section Fall Conference "Awakenings to Diversity" "Special Populations: What Staff Need to Know"
2010 Created workshop on differentiating instruction, including cognitive development, brain research, and learning styles

Articles
2014 "Surviving the Adolescent Brain", article in Comments Magazine, Metairie Park Country Day School
2016 "On a Mission: Defining the Relationship Between Intellect and Character", article in Comments Magazine, Metairie Park Country Day School

Blog Posts
Resilience
Kindness
The Value of Outdoor Education
The Character Side of Education
The Art of Possibility
Experiential Learning

Affiliations

Member of Association for Supervision and Curriculum Development
Member of Independent Schools Association of the Southwest

Personal/Interests

Married: Wife, Susan, and one daughter, Sara. Enjoy travel, music, art, sailing, cycling, golf, tennis and hiking.

LAKEISHA K. GREEN
Contact Information
504-400-7042
Lkgreen04@gmail.com

Background Summary

- Born and raised in New Orleans, LA (Algiers)
- Educational Background in Political Science and Business Entrepreneurship
- (12 Yrs.) Administrative, Healthcare, Community Outreach and Management Experience.
- Skilled in Customer Service, Social Services, Sales, Financial Budgets, Audits and Office Software Applications.

Work Information

Louisiana Department of Health- New Orleans, LA (April 2014-Present)
Medicaid Analyst

- My Position includes conducting interviews with clients and making necessary collateral contacts for verifications to determine eligibility or ineligibility for Medicaid Programs. Interpreting and applying complex federal, state, and local agency policies for each program. Contacting individuals, companies, businesses, local, state and federal agencies as needed to obtain or to verify information for case assignments. I also help people in the community apply for health care services and provide them with information in regards to various Louisiana Medicaid and Medicare programs.
- Currently assisting staff at West Jefferson Medical Center with eligibility determinations for patients in need of Healthcare Services. Previously assisted staff at University Medical Center with eligibility determinations for patients needing Healthcare services from June 2016 until March 2018.
- Joined the Medicaid Expansion Committee in 2016 under Louisiana Governor John Bel Edwards promoting Healthy Louisiana. As a committee member I held community outreach events, formulated the idea to integrate the use of social media to inform the community and gave presentations throughout the region to help spread awareness about the Medicaid Expansion enrollment established on July 1, 2016.

Education

Xavier University of Louisiana- New Orleans, La
Bachelor's Degree Received

- Major: Political Science and Business Entrepreneurship
- Completed Legal Internship- Morris Reed Jr. Law Firm
- My college coursework included: Public Policy, Public Administration, Political Economy, Urban Politics, African American Studies, Logic, Ethics, Child Psychology, Sociology, Economics, Research Methods and Quantitative Analysis, Working with SSPS, Data Collection, Case Studies, Accounting, Business Administration and Management.

Donaldson Educational Services Real Estate School- Metairie, La

- Real Estate Certification of Completion Received

Warren Easton Fundamental Senior High- New Orleans, La
High School Diploma Received

- Clubs: Honor Society, COE (Cooperative Office Education) and

  FBLA (Future Business Leaders of America)

Resume of Frank Douglas Harrell

3690 Plymouth Place New Orleans, Louisiana 70131

SUMMARY

Thirty years experience in progressively responsible finance, accounting and management roles. Have managed budgeting, treasury, tax compliance, accounting, accounts payable, payroll, accounts receivable, business office, grants accounting, and cost studies functions. Experience in supervising purchasing, information systems, and retail business departments.

Capabilities and Skills

- Proven ability to meet work deadlines
- Strong supervisory skills and ability to motivate through timely counseling
- Outstanding analytical skills that contribute to timely problem resolution
- Expert, broad knowledge of financial and tax reporting with excellent organizational skills resulting in high quality reports and board presentations
- Extensive budgeting and forecasting expertise resulting in timely insight to business trends
- Committed to "stand out" customer service
- Skilled in use of personal computers and wide range of accounting, finance and business software

Professional Experience and Accomplishment Highlights

University Controller, V. P. for Finance Tulane University, December, 2000 to present:

- Promoted to Vice President for Finance and Controller in 2003, assuming debt management, cash management and institutional financing responsibilities.
- Played important role in managing staff, student, and vendor issues through critical and chaotic time after Hurricane Katrina.
- Met all financial reporting and audit requirements during tenure at Tulane. Financial reporting and cash forecasting have been significantly improved.
- Leadership role in automation improvement for the university: Webspace, Effort Reporting, Accounts Receivable Payment portal, Comprehensive Rate Index System, Concur workflow for Accounts Payable.
- Key role in restructuring debt and near term cash flows by managing $400 million bond issue in wake of Hurricane Katrina. Completed other cost effective financings as needed.
- Successfully maintained $100 million in bank lines of credit for 10 years.
- Manage key business offices for the University: Accounting, Grants Accounting, Cost Studies, Payroll, Accounts Payable, Student Accounts Receivable, and Financial Services. Responsibilities have increased steadily.
- Key role in setting financial policy via Finance Group meetings and other collaboration.
- Represent the University in ongoing conferences of Controllers for peer institutions.
- Prepared cost proposal to support University's key indirect cost rate. Managed to an outstanding conclusion, preserving $2M in "at risk" indirect cost recoveries. Maintained excellent results for the university in managing government rate contracts.
- Implemented revised billing/collection activities and strategies that resulted in decreasing Tulane AR levels by approximately $15,000,000, while improving unit accountability.

- Prepared fringe benefit proposal accepted by the federal government that revises accounting practices by the entire institution. Benefits include enhancing cost recoveries and improved timeliness of billing and budget preparation.
- Analyze new accounting pronouncements or special situations and recommend accounting practices. All significant recommendations have been accepted.
- Present changes to various on campus constituencies ranging from Committees of the Board and Executive Management
- Lead member of Tulane Accounting Management System Advisory Committee – executive management of TAMS upgrades.
- Routinely take problem student/parent calls routed through the President's Office and find solutions for customers. Identified and implemented solutions for improving Business Office effectiveness. Problem calls plummeted.
- Revised payroll processing procedures that resulted in decreasing suspended payroll by over $1.0 million.

Vice President for Finance, Audubon Institute from 1994 to 1998, promoted to Senior Vice President effective January 1, 1999:

- Managed through recent IRS audit, handling all communications and reaching settlement on all items for a nominal total.
- Implemented central purchasing systems that save approximately $50,000 per annum.
- Consistently scored "outstanding" in annual performance reviews.
- Implemented fund accounting systems to provide complete accounting control over endowment funds, restricted funds, capital projects, etc. across three entities.
- Played key role in annual budget process through identification of cost reduction and revenue enhancement opportunities.
- Administered key role in redirecting resources to endowment funds status. Overall endowment went from $0 to $24,000,000 in 5 years and now provides critical operations' funding.
- Implemented investment and cash management strategies for reserve funds and excess cash balances resulting in enhanced cash flows of $100,000 per annum.
- Negotiated three credit lines with local banks that totaled $6,000,000.
- Identified and participated in executing a bond refinancing opportunity that resulted in converting a "junk" bond issue to AAA rated insured bonds. Resulted in releasing $2.5 million in reserve funds to construction purposes.
- Met all externally imposed reporting deadlines (tax returns, financial statements, budgets, coverage ratios, etc.) for the past five years.
- Improved internal accounting controls in the Finance Office through hands on involvement resulting in clean management letters from the external auditors.
- Researched reimbursement on major capital grant from point of inception and identified unbilled cost items totaling $200,000. Recouped shortfall and installed procedures to ensure that all qualified costs are billed timely.
- Implemented significant new accounting standards such that no audit adjustments were required. Lead auditor indicated she had never seen a better implementation.
- Evaluated software and system needs for the Finance Office negotiated 40% off retail price for selected system. Implementation was executed flawlessly and on schedule.
- Revamped daily collection and distribution of revenue and volume information such that critical information is logged and reported each day to senior management.
- Routinely supervised the preparation of 250 to 300 checks (1,000 invoices) a week. Vendor complaints are near zero.

Controller at Mercy Hospital of New Orleans from 1992 to 1994 when Mercy was merged with Southern Baptist Hospital:

- Implemented procedures to ensure that available use tax exclusions were considered by the Hospital. Planned and managed refund requests totaling $125,000.
- Successfully compiled and presented position overturning $1.5 million in capital disallowances asserted by Medicare auditors.
- Improved reporting of departmental labor cost variances thereby allowing management to focus on significant labor cost problems. Supervised implementation of an automated biweekly productivity reporting system.
- Improved policies and procedures to ensure that accounts rejected by the intermediary were appropriately contested.
- Recognized by the System Office for preparation of 990 tax returns with highest quality.

Deloitte and Touche, New Orleans 1979 to 1991: Positions held included staff accountant, senior accountant, manager and senior manager.

- Served as audit manager on such complex engagements as Entergy Corporation, Tulane University & Medical Center, Ochsner Clinic and Avondale Industries.
- Named an Industry Specialist by D&T in Health Care, Higher Education & Public Utilities.
- Served as instructor at national training seminars for new professionals.
- Performed due diligence procedures for clients in connection with proposed purchases of business operations. In one instance, findings produced savings exceeding $200,000.

Education and Other

BS and MBA degrees, Louisiana Tech University, Ruston LA 1978 and 1979
Graduate of the Dale Carnegie Course
Member of the AICPA and the LCPA

Excellent references available on request

Jean Paul Hymel

415 Fairway Drive
New Orleans, LA 70124

Phone: 504.460.1702
jeanpaulhymel@cox.net

EDUCATION

Tulane University School of Engineering
Tulane University, New Orleans, LA
Bachelor of Science in Engineering—May 1996

- Major in Electrical Engineering—Cumulative GPA: 3.61

J. Whitney Bunting School of Business
Georgia College and State University, Milledgeville, GA
Master of Business Administration—August 1999

- Cumulative GPA: 3.95

EXPERIENCE

Gallo Mechanical — HQ in New Orleans, LA (Gulf Coast)
Executive Vice-President, January 2014 – Present
Gallo Mechanical Services — HQ in New Orleans, LA (Louisiana)
Chief Executive Officer, January 2014 – Present

- Gallo Mechanical is a commercial HVAC (Air Conditioning & Heating) and Plumbing contractor with commercial, institutional, and industrial clients throughout the Gulf Coast – including:
  - Louisiana Superdome
  - University Medical Center
  - Loyola University
  - Dow Chemical
  - Sasol
  - Federal Government / Military Bases
- Gallo Mechanical Services is a full-service HVAC and Plumbing Services Company serving clients throughout south Louisiana.
- Responsibilities for both Gallo Mechanical & Gallo Mechanical Services include: financial success, business development, operations, and client satisfaction.

Johnson Controls—North America
Business Development Director, September 2001 – December 2013

- Managing board level, C-level, and director level relationships with universities & colleges, state & local governments, Public Private Partnership (P3) developers, general contractors, architectural & engineering firms.
- Providing leadership within accounts by identifying problems and implementing innovative solutions. These solutions result in improved operational efficiency and significant return on investment for business partners.
- Project Highlights:
  - Infrastructure Ontario – P3, Providence Care Hospital ($200M+)
  - Tulane University – Hurricane Katrina Rebuild ($40M+)
  - Tulane University – Energy Projects ($50M+)
  - Dillard University – Hurricane Katrina Rebuild ($12M+)
- Recognition Highlights:
  - Johnson Controls, Inc. Chairman's Award – Hurricane Katrina Leadership
  - 4-Time Master's Recognition (Sales Excellence)
  - Sales MVP (Multiple Regional and Higher Education Awards – Innovation, etc)

CSR Electronics—Atlanta, GA
Strategic Account Manager, December 2000-Septemer 2001

- CSR Electronics is a manufactures representative firm with over 10 business partners throughout the Southeast and Florida. Business partners include: IBM Microelectronics, International Rectifier, Micrel Semiconductor, Bourns, Lattice Semiconductor, and Marvell Semiconductor.
- Within this complex sales environment—managing principals, distributors and customers, I was responsible for 10 strategic accounts including: Motorola, American Megatrends, Ciena, Agere, and General Instruments. These accounts represent well over $50M of semiconductor market made up of complex ASIC(Application Specific Integrated Circuits) solutions to the most basic resistor network.

UNITED STATES AIR FORCE—Robins AFB, GA
Electronic Warfare Engineer, June 1996-June 2000

- Led 30-man base decontamination team during basewide Operational Readiness Inspections
- Developed and implemented a three-phase solution to an Air Force-wide Programmable Read Only Memory (PROM) deficiency—Involved user, maintainer, and government contractor interface
- Developed, Tested, and Implemented software for worldwide release to F-15 units

COMMUNITY

Current Engagement:

- Crescent City Schools – Charter School Board
- Maisonette Condominium Association – President
- Cowen Institute – Advisory Council
- Tulane City Center – Advisory Council
- Tulane School of Architecture – Advisory Council
- Newcomb Tulane College – Advisory Council
- EMPLOY Collaborate / 100K Initiative – Opportunity Youth

Previous Engagement:

- St. Francis of Assisi Pastoral Council
- UNO Engineering Advisory Council

Julius E. Kimbrough, Jr.
4014 Orleans Avenue, New Orleans, LA 70119 • (504) 390 – 9102 • jekimbrough.jr@gmail.com

EXPERIENCE

Crescent City Community Land Trust — New Orleans, LA
Executive Director — 2015 - present

- Responsible for organizational leadership, project management, financial planning and fundraising, personnel management, publications and public relations.
- Commercial, residential and mixed-use real estate development and vacant land initiatives.
- Preservation of one-time public and private investment for future generations.
- On-going relationships and capacity building with homeowners, renters and businesses to assure healthy communities for years to come.

Liberty Bank and Trust Company — New Orleans, LA
Vice President – Community Development Group — 2003 - 2014

- Founded bank's Community Development Group and manager of all aspects (capital raising, lending, operations, credit administration, marketing, internal and external financial reporting, audit management, state and federal legal compliance, and vendor management) of $200 million balance sheet.
- Supervisor of team responsible for bank's $160 million New Markets Tax Credit program, grant funded initiatives ($10 million) and private equity activities ($2 million) including application production, project sourcing & structuring and investor relations.
- Manager of the bank's for-profit and non-profit community development corporations, its philanthropic foundation and an umbrella organization coordinating thirty neighborhood associations.
- Point-person on many special projects, including: a post-hurricane $20 million deposit raising campaign and cultivation of national relationships with other mission-driven partners, non-profits and government agencies.

Houlihan, Lokey, Howard & Zukin — Chicago, IL
Investment Banking Associate — 2001

- Prepared and managed the production of in-depth valuation analyses utilizing discounted cash flows, comparable publicly traded companies and comparable transactions.
- Drafted company specific and industry-wide research and analyses in support of senior bankers.
- Served as liaison to clients regarding active assignments, potential transactions and strategic alternatives.

Charbonnet & Associates, Planners and Consultants, Inc. — New Orleans, LA
Urban Planner — 1998 – 1999

- Generated valuation analyses of real estate and undeveloped land utilizing discounted cash flows, comparable transactions and replacement cost methodologies.
- Assessed the feasibility of developing a $30MM six-course golf trail, including economic impact modeling and the projection of jobs created and tax revenues generated.
- Developed capital improvement financing plans for airports ranging from $5 million to $30 million.

University of New Orleans, Division of Business and Economic Research — New Orleans, LA
Research Analyst — 1996 – 1998

- Produced quarterly and customized reports analyzing the economies of Louisiana and its metropolitan areas, focusing on major business sectors (energy, transportation and tourism) and economic events.
- Evaluated employment statistics and other economic indicators using quantitative and qualitative analysis.
- Participated in the development and maintenance of statistical models used to forecast employment changes.

EDUCATION

University of Chicago Graduate School of Business — Chicago, IL
Master of Business Administration, Concentrations in Accounting and Finance — June 2001

University of Chicago Graduate School of Public Policy — Chicago, IL
Master of Public Policy, Concentration in Economic Development — June 1995

Hampton University — Hampton, VA
Bachelor of Arts, History, With Honors — May 1993

VOLUNTEERING

- Crescent City Schools, Inc. (charter school management organization board member)

DERRICK O. MARTIN

3708 Post Oak Avenue ~ New Orleans, LA 70131 ~ (504) 505.0358

domart@hotmail.com

Results-oriented leader with progressively responsible experience. Strategic planning professional, capable of structuring organizational frameworks, managing programs/projects with budget parameters, and providing complex analysis to ensure achievement of long-term objectives. Strong business development leader, accomplished in establishing rapport with individuals, organizations and agencies alike. Experience includes: economic/workforce development, project management, communications, organizational development, problem solving, process and quality improvement.

PROFESSIONAL EXPERIENCE

ALGIERS ECONOMIC DEVELOPMENT FOUNDATION (AEDF), New Orleans, LA 2013-Present
Executive Director
Responsible for executing Economic Development, Advocacy and Public Policy initiatives for Algiers, a 17 square mile community that represents one of the largest community tax base within Orleans parish.
Local demographics represents >60+k people and >22k families.

- Established new methodologies and tactical execution towards creating sustainable strategies which led to minimizing expenditures and increasing output.
- Developed strategic plan to launch new initiatives aimed and increasing annual budget by 150% and reducing operations expenditures by 35%
- Worked with regional leaders to engage AEDF into the state economic development eco-system to create positive work flow synergies
- Assisted in 600,000+ sq. ft. of New Construction & Renovations
- Partnered and collaborated with private sector business to create 950+ jobs via $150m capital investment
- Led the largest blight remediation effort targeting more than 225+ acres towards creating medium dense mixed used entertainment, retail and office park while welcoming
- Championed mixed used residential & commercial redevelopment through facilitation of public-private opportunities

NEW ORLEANS BUSINESS ALLIANCE, New Orleans, LA 2012-2013
Director of Business Retention & Expansion
Reporting to the Vice President of Business Development & Marketing, responsibilities include developing and leading the Business Retention and Expansion (BRE) Division to enhance the local competitiveness of the City's business community, by facilitating and supporting local job and investment retention and the expansion of existing business.

- Aggressively conducted >100 face to face and online business retention "DeltaPLUS" surveys in 5 months to identify both positive and negative business activity. Data collected fashioned a systematic approach to addressing the most common concerns and issues
- Developed and implemented detailed plans regarding identifying, tracking and executing projects with effectiveness and efficiency, increasing BR|E activity by >50%. Redefined BR|E goals, performance measures to align with the organization overall strategic planning
- Co-developed a 5 year strategic plan for Orleans Parish which identified 5 key industry sectors.
- Created several focus groups encompassing >30 businesses and/or business leaders to identify economic trends through the gathering of field intelligence.
- Created, implemented and managed a strategic focus group (**NOLA Human Capital Collaborative**) with an emphasis on providing human resource support for businesses within the Greater New Orleans region

MARICOPA COUNTY, Workforce Development Division, Phoenix, AZ 2007-2012
Business Operations Manager

Managed a staff of 10 with responsibilities to support large and small businesses throughout Maricopa County in areas of business development, labor market research, lay-off aversion, and employee recruitment and retention

- Developed and managed communication plans to create program awareness to an audience of 20+ cities & towns to include more than 300k businesses;
- Successfully collaborated with Public/Private Economic Development & Workforce Development Organizations in attracting businesses to Arizona generating an estimated 6000 jobs and $6.5+b in payroll and capital investment
- Created reports to track divisions performance against key metrics and departments 2-Year Plan as well as created processes in which Business Services worked in concert with Program Services to effectively serve both job seekers and businesses
- Co-developed strategies to address Rapid Response (RR), Reduction in Force (RIF) activities affecting 5000+ employees. Strategically planned to effectively and efficiently service 1500+ businesses annually while undergoing a 75% downsize in staff
- Led divisions' efforts in working with 20+ cities and towns, strategizing on creating high wage jobs in a wide range of industries, while focusing on Renewable Energy, Aerospace & Defense, Manufacturing, Advanced Business and Bioscience
- Co-Chaired a cross functional team that analyzed and redesigned a promotional campaign to market the divisions core competencies, efforts geared to increase center traffic and garner more employer participation
- Prepared detailed performance reports and briefs on trends related to workforce development for Executive Leadership and internal staff;

GENERAL MOTORS, Lansing, MI 2005-2006

Launch Team / Manufacturing Group Manager

Selected to participate in the development and build out of GM's newest manufacturing facility. A capital infusion of $3.5 billion to create 3 new product lines with future capabilities of 5

- Assisted in analyzing previous manufacturing, work policy, quality improvement processes and union activity for several GM facilities in an effort to create cutting edge solutions for future facility;
- Designed Standardized Work Environment policies to build quality vehicles reducing Problems Per Minute (PPM) by 15%;
- Managed build operations that produced 425 vehicles across 2 platforms per shift capable of generating $5.8m in revenues in an 8 hour shift;
- Department communications lead for 100+ union staff and project stakeholders. Responsibilities included all plant messaging ;
- Developed, managed and directed a roster of 75 Union Workers while simultaneously leading department category in lost work days. Maintained a 5% unexcused absenteeism workforce vs. department average of 18%
- Managed rework and material usage and engineered production tools to enhance vehicle fit process reducing scrap by $1.5m quarterly & $6m annually;
- Team lead for Continuous Improvement Module (CIM) focusing on reduction of Wind Noise, Door fits and Direct Runs

EDUCATION & PROFESSIONAL DEVELOPMENT

Bachelor of Science in
Communications/Marketing, Jackson
State University - Jackson, MS

Certificate in Project Management - George Washington
University
6 Sigma Quality Training – (GMU) General
Motors University New Horizons Practical Problem
Solving
Influence Strategies and Leading in Negotiations – Hewlett-Packard

FRANK M. RABALAIS

4418 PAINTERS STREET
NEW ORLEANS, LA 70122
TEL: 504-495-4060 FRANK.RABALAIS@GMAIL.COM

Education

* The University of New Orleans, 2001-2004.
  -Master of Business Administration *(Finance Concentration),* 2004.

- Completed rigorous coursework in Financial Accounting, Managerial Economics, Marketing, Statistics, Operations Management, Human Resources, Business Law and Finance.
- Co-authored Environmental Assessment section of Hibernia Corporation company analysis group project, with particular emphasis on ramifications of Hibernia's acquisition of Coastal Bancorp, Inc. and expansion into Texas. Lead Presenter of Hibernia company analysis research findings before Business Policies Capstone class.
- Author of case study marketing analyses of corporate strategic direction and product positioning, making extensive use of contribution margin analysis as a specific aid in pricing decisions.

* Tulane University School of Architecture, 1998-2002.
  -Master of Preservation Studies, 2002.

- Speaker on Seaside, Florida and the New Urbanism design movement before historic preservation symposium at Tulane University.
- Author of numerous research papers, including works on the "garden city" Lake Vista neighborhood of New Orleans, urban redevelopment in 1960s Chicago, and the early-20th century City Beautiful movement in America.
- Team leader researching and writing recommendations to boost home ownership within New Orleans' Irish Channel neighborhood.
- Drafter of exterior elevation drawings for rehabilitation of 2315 Annunciation Street.
- Speaker before Irish Channel Neighborhood Association presenting rehabilitation plans for 2315 Annunciation Street (rehab subsequently realized).

* The University of Chicago, 1993-1997.
  -Bachelor of Arts *(History),* 1997.

- Completed Chicago's celebrated *Common Core* Liberal Arts curriculum, requiring two-and-a-half years of undergraduate coursework in Calculus, Statistics, the Natural and Social Sciences, the Humanities, and Foreign Languages.
- Undertook primary source research in French-language publications to write English-language senior thesis, *Action Française: Immigration in France through 1974.*
- Specialized in Modern European, African-American and Modern Middle Eastern history.

Work Experience

Crescent Growth Capital, New Orleans.
-Tax Credit Consultant, 2008-Present.

Authors project marketing pieces targeting Community Development Entities (New Markets Tax Credit allocatees). Researches and prepares all Historic Preservation Certification Applications and *National Register of Historic Places* nominations, and collaborates to close tax credit financings. Lead author for Live Performance Infrastructure Tax Credit applications and Principal Liaison with the Louisiana Division of Historic Preservation and Louisiana Economic Development with regard to those entities' tax incentive programs. Effected numerous strategic initiatives for Crescent Growth Capital, including authoring in 2012 a successful application to create an *Uptown-University Cultural District* in New Orleans, lobbying the Louisiana Lieutenant Governor and the New Orleans City Council on its behalf, and lobbying the Louisiana Legislature in favor of extending the state historic tax credit program, in 2011 and 2015 (successful both years).

Ameriprise Financial, New Orleans and Baton Rouge.

-Associate Financial Advisor, 2005-2008.

Acquired, then partnered with individual and small business clients through pursuit of ongoing fee-based financial planning relationships. Recommended appropriate asset allocation, provided cash flow and investment accumulation projections, and identified insurance, estate and business succession needs. Directly managed $4.5 million in client assets. Aided in management of additional practice assets, approximately $52 million in total. Performed due diligence securities analysis in preparing recommendations for client investments. FASB-granted Series 7 Securities License. Recognized for superior communication and analytical abilities.

The Design Build Group, New Orleans. ***(Concurrent pursuit of UNO MBA)***

-Project Analyst/Construction Management Aide *(Internship)*, 2004-2005.

Assisted in financial modeling and market demand analysis for numerous projects, reviewing income and population demographic trends, potential market area, comparable properties and optimal tenant mixes. Managed the Restoration Tax Abatement application for the Ironworks Residences adaptive re-use project in New Orleans' Warehouse District, as well as for 920-26 Tchoupitoulas Street. Authored Historic Preservation Certification Applications, interfaced with the Louisiana Division of Historic Preservation, then secured Federal Historic Rehabilitation Tax Credits for 920-26 Tchoupitoulas. Construction Management Aide for the Ironworks Residences.

Riverlake Properties, New Orleans. ***(Concurrent pursuit of UNO MBA)***

-Property Manager, 2002-2004.

Directed rent collection, marketing, leasing, maintenance and groundskeeping. Reversed sliding occupancy levels, then maintained occupancy at 4021 and 4217 Hessmer Avenue, Metairie (80 units) within consistent 95-100% range. Maintained payment accounts for each tenant, tracking payment history and outstanding balances. Re-landscaped grounds and raised average rent. Promoted in April 2003 to manage an additional 42 units at 1010 Lake Avenue, Metairie.

Preservation Resource Center, New Orleans.

-Educational Information Manager, 2001 *(Practicum for Tulane MPS)*.

Team leader in development of program in historic preservation education for visiting students from area elementary schools. Personally led twelve programs subsequent to program launch. Team member in successful grant application to Louisiana Endowment for the Humanities, *Living with History*, to fund development of neighborhood-specific informational and marketing brochures. Personally secured support for same LEH grant application from seventeen neighborhood organizations in New Orleans. Developed exhibit content and improved flow of exhibit space at PRC headquarters. Catalogued and computerized instances of Federal Historic Rehabilitation Tax Credit use in New Orleans' downtown.

Degan, Blanchard & Nash, New Orleans. ***(Concurrent pursuit of Tulane MPS)***

-Paralegal, 1998-2000.

Worked closely with firm lawyers in an administrative support capacity. Reviewed and summarized document production, corresponded with fellow and opposing counsel, copy-edited legal briefs prior to court filing, and scheduled appointments. In new business development, edited correspondence to prospective clients.

Current Community Service and Other Abilities

* Crescent City Schools *(a public charter school management organization)*, 2014-Present.
  -Board Member & Strategic Planning Committee Member.

* Gentilly Terrace & Gardens Improvement Association, 2015-Present.
  -Board Member & President.

* Fluency in French.
  -Speaking, Reading and Writing.

* Musician.
  -Voice, Guitar, Bass, Piano and Drums.

Danielle L. Smith

1511 Iberville St apt 101, New Orleans, LA 70112

(C) 504-905-0475

danlovesmith84@gmail.com

SUMMARY

Good communication skill. Team solid builder. Professional working oriented and able to work under pressure. Be able to work in detail and according to deadlines. Be able to work with orientation to customer, team and office support skills

SUMMARY OF QUALIFICATIONS

- Multi-faceted professional with diverse experience in Customer Service.
- Established ability in oral and written communications, computer programs and standardized forms (Microsoft products)
- Problem solver, team player and customer service minded worker with excellent organizational skills

EXPERIENCE

Sept 2017-Present, Sewerage & Water Board New Orleans, Revenue/Special Accts

- Review Service Orders/Accts
- Research Request to Determine Validity
- Develop Reports on Accts Activity
- Establish Standard of Procedures for Job Functions
- Compile Written Procedures into dept Standard of Procedure

June 2016-August 2017, IST Management, Office Clerk

- Providing support to the company through both administrative and clerical duties.
- Maintaining the office stationary, catering supplies and IT equipment
- Gathering useful and important information by phone, letters, and email.
- Spreadsheet creation and management.

August 2015-May 2016, Lambeth House, Receptionist, New Orleans LA

- Answer incoming calls and direct calls to appropriate associates and operate switchboard
- Send emails, faxes, collect and distribute parcels and other mail
- Schedule meetings in conference rooms
- Perform basic bookkeeping, filing and clerical duties
- Arrange appointments and update appointment calendars
- Create and update spreadsheets, keep record of employees in-inservice hours/training

December 2012-June 2015, Diva Beauty, Assistant Manager, New Orleans LA

- Demonstrates desired behaviors for staff including driving sales, handling difficult and/or complicated sales, cash management, inventory, and follow-up with customers
- Deliver an excellent customer service experience; proactively greeting, educating, and engaging customers who visit the store; offering tips on the product
- Engage store personnel and educate them on the features and benefits of the product to increase brand awareness
- Perform financial transactions including paying, receiving, and cash control duties, minimize loss, reduce risk, and deliver accurate and superior customer service.

October 2012-May 2013 Home Depot, Part-time Cashier, Chalmette LA

- Process credit card and check payment
- Enter transactions in the cash register and provide customers with the total bill
- Perform the duties of customer service representative when required

May 2010-August 2012 Harrah's Casino, Cage Cashier, New Orleans LA

- Maintain confidentiality of customers transaction
- Convert gaming checks, coupons, tokens, or coins to currency for gaming patrons.
- Count funds and reconcile daily summaries of transactions to balance books.
- Cash checks and process credit card advances for patrons.

July 2006- January 2009, Iron Mountain, Data Entry Clerk, Harahan LA

- Prepare customer and account source documents by reviewing data for deficiencies; resolving discrepancies by using standard procedures or returning incomplete documents to the team leader for resolution.
- Enters customer and account data by inputting alphabetic and numeric information on keyboard or optical scanner according to screen format.
- Verifies entered customer and account data by reviewing, correcting, deleting, or reentering data; combining data from both systems when account information is incomplete; purging files to eliminate duplication of data.
- Secures information by completing database backups.

KEY SKILLS AND COMPETENCIES

- Proof reading documents to a high standard
- Used to working office equipment and computers
- Excellent telephone manner
- Able to efficiently work under pressure
- Inputting days accurately and efficiently

Education

Sarah T. Reed High School 2009-2003, New Orleans LA

Southern University at New Orleans, 2005-2008 General Studies, New Orleans LA

Delgado Community College, 2009 Basic Life Support/CPR , New Orleans LA

Nunez Community College, 2014-2015 License Practical Nurse, Chalmette LA

ROBERT J. STEFANI

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Metairie, LA 70005
(504) 388-2817
rstefani@kingkrebs.com

BAR MEMBERSHIPS

- Louisiana, 1988.
- New York, 1988.
- District of Columbia, 1989.
- Texas, 2011

EDUCATION

- Juris Doctor, cum laude, Tulane University School of Law, New Orleans, LA; 1987.
- Bachelor of Arts, cum laude, Brandeis University, Waltham, MA; 1983.

WORK EXPERIENCE

- Advised and represented businesses, primarily in oil and gas, chemical and maritime industries, in commercial, corporate and financial transactions and litigation in state and federal courts
- Represented financial institutions in loan transactions involving marine, oil and gas, real estate and other assets.
- Advised and represented financial institutions and vessel owners in transactions involving the sale, financing, purchase and charter of vessels, mergers of maritime companies, bankruptcy reorganizations, and the perfection and enforcement of preferred ship mortgages, maritime liens and other security interests.
- Represented vessel owners and financial institutions in dealings with the Maritime Administration, Coast Guard and other governmental agencies in matters relating to maritime promotional programs, vessel charters, and compliance with citizenship and vessel documentation requirements.
- Counseled shipping companies and drilling contractors on maritime legislation and compliance with maritime regulatory requirements.
- Represented marine insurers in Coast Guard and NOAA rulemaking proceedings implementing the Oil Pollution Act of 1990.
- Advised marine insurers and shipping companies on state and federal requirements relating to the transportation of oil and hazardous substances and on liability for spills under state and federal law.
- Represented shipping companies, shippers, freight forwarders, port authorities and marine terminal operators in adjudicatory proceedings and investigations before the Federal Maritime Commission.

PROFESSIONAL AND COMMUNITY AFFILIATIONS

2012-Present	Crescent City Schools – Board of Trustees (Current Board Chair)
2009-2012	Akili Academy Charter School – Board of Trustees
2009-Present	Louisiana Banker's Association

HONORS AND RECOGNITION

Best Lawyers in America
Martindale-Hubbell AV-Preeminent Rating (5.0 out of 5)
New Orleans City Business Leadership in Law, Class of 2011

MORGAN WILLIAMS

919 Florida Ave. NW Apt. 605. · Washington D.C. 20001 · (202) 486-2776 · morganwhitneywilliams@gmail.com

EDUCATION

TULANE UNIVERSITY LAW SCHOOL **New Orleans, LA**
J.D., Dec. 2007, Magna Cum Laude

Honors: 2007 Louisiana State Bar Association Law Student Award; 2007 NYS Bar Association President's Pro Bono Service Award; 2006 NALP/PSLawNet Pro Bono Publico Award; 2006 LexisNexis Martindale-Hubbell Exemplary Public Service Award; 2006 ABA Tort & Trial Practice Scholarship Fund; 2005 Tulane University Crest Award.
Activities: Student Hurricane Network, founder; Equal Justice Works, board of directors and national advisory board; From the Lake to the River, steering committee member; Tulane Public Interest Law Foundation, board member; ACLU of Louisiana, externship; Office of Recovery Management, internship.
Clinical Experience: Civil Litigation Clinic; Criminal Defense Clinic.
Study Abroad: Intercultural Negotiation and Mediation Program, Humboldt University, Berlin, Germany.

OBERLIN COLLEGE **Cleveland, OH**
B.A., Environmental Science, May 2002

Honors: 2003 Compton Foundation Post-Graduate Mentor Fellowship; 2001 Ann Schaening Memorial Fund Research Grant; 2001 Joyce Gorn Memorial Prize.
Study Abroad: Global Ecology Program, Bard College, England, Tanzania, Mexico, Philippines, India.

LEGAL EXPERIENCE

NATIONAL FAIR HOUSING ALLIANCE **Washington, DC**
Director of Enforcement and Investigations 2012 - present
Coordinate national investigations, manage federal litigation and administrative complaints, provide technical support to local fair housing advocates, manage team of eight investigators, provide fair housing training and public presentations.

GREATER NEW ORLEANS FAIR HOUSING ACTION CENTER **New Orleans LA**
General Counsel, Equal Justice Works Fellow 2008 - present
Managed fair housing enforcement in Louisiana and Mississippi. Coordinated federal litigation, drafted policy reports, filed administrative complaints, oversaw testing program. Partnered with local and national co-counsel, HUD and DOJ.

NAACP, LEGAL DEFENSE FUND **New York, NY**
Law Clerk, Education and Voting Rights Divisions Summer 2007
Drafted legal memoranda for Federal Community Development Block Grant Program, National Voter Rights Act, and Louisiana Recovery School District litigation. Assisted with response to Supreme Court school integration cases.

NEW ORLEANS LEGAL ASSISTANCE **New Orleans, LA**
Law Clerk, Housing Law Unit Summer 2006
Drafted legal brief for the Louisiana Court of Appeals. Drafted policy memoranda for the New Orleans City Council, the Housing Authority of New Orleans, and HUD. Coordinated clinic to provide tenants with legal services.

UNITED STATES DEPARTMENT OF JUSTICE **Washington D.C.**
Law Clerk, Criminal Antitrust Division Fall 2005
Researched and drafted memoranda regarding evidentiary rules, conspiracy doctrine, and an arms company investigation. Observed and participated in investigatory interviews and agency strategy meetings.

UNITED STATES DISTRICT COURT, EASTERN DISTRICT OF LOUISIANA **New Orleans, LA**
Extern for The Honorable Sarah Vance Summer 2005
Researched and drafted memoranda regarding decisions and motions before the court. Observed and participated in the judicial process including trials, arraignments, hearings, negotiations, and jury selections.

TEACHING

Adjunct Professor, Loyola University New Orleans College of Law
Housing Law and Policy Seminar, Fall 2011

Adjunct Professor, American University Washington College of Law
Housing Law and Policy Seminar, Fall 2012

OTHER PROFESSIONAL EXPERIENCE

INTERNATIONAL HONORS PROGRAM — **Bangalore, Capetown, Rio**
Trustee Fellow — Winter 2003 - Spring 2004
Served as teaching fellow, traveling facilitator, and resident advisory for an undergraduate academic program that studies the dynamics of globalization by analyzing problems that large cities face in the developing world.

STAY LOCAL, URBAN CONSERVANCY — **New Orleans, LA**
Interim Executive Director — Fall 2003
Launched citywide campaign to support locally owned and operated businesses in the greater-New Orleans area. Assembled a board of directors, wrote grants, coordinated outreach, and developed programming.

OBERLIN DESIGN INITIATIVE — **Cleveland, OH**
Founder, Director — Fall 2000 - Summer 2003
Administered a not-for-profit corporation that works with community leaders throughout northeast Ohio to create sustainable development. Fundraised and administered a $100,000+ annual budget.

CAMIROS, LTD. — **Chicago, IL**
Research Consultant — Summer 2001
Drafted research documents for community economic development plans. Provided technical assistance for Chicago zoning-code revisions, including model provision research and focus group facilitation.

OBERLIN CAMPUS DIALOGUE CENTER — **Oberlin, OH**
Mediator — 2000 – Fall 2001
Co-founded a program that promotes social justice and conflict transformation through mediation and group facilitation. Received mediation training, conducted mediations, and facilitated group discussions.

PUBLICATIONS

Disasters' Long-Term Impact on Fair Housing: Rebuilding as an Engine to Perpetuate or Challenge Entrenched Segregation (*American Bar Association Housing and Community Development* publication, 2013); Housing Choice in Crisis: An Audit Report on Discrimination Against Housing Choice Voucher Holders (*GNO Fair Housing Action Center published,* 2009); Access Denied: An Audit Report on Housing Accessibility for People With Physical Disabilities (*GNO Fair Housing Action Center published,* 2009); Networks and Norms: Social Justice Lawyering and Social Capital in Post- Katrina New Orleans (*Harvard Civil Rights-Civil Liberties Law Review*, 2009); Model, Myth or Miracle: Principles of Urban Design in Curitiba, Brazil (*Earth Times*, 2002).

CIVIC ENGAGEMENT

2009-2010 Rockefeller Foundation Redevelopment Fellowship Center for Urban Redevelopment Excellence Training Program, scholar; 2009-2010 Terry Sanford Institute of Public Policy at Duke University Effective Leadership Program, fellow; 2009-2010 Louisiana State Bar Association Leadership Class, fellow; Louisiana State Bar Association Access to Justice Committee, member; Goodwill Industries of Southeastern Louisiana, board member; Louisiana Bucket Brigade, board chair; Benjamin E. Mays Preparatory Charter School, founding board member; Social Entrepreneurs of New Orleans, founder; EngageNOLA Civic Engagement Coalition, founder; Greater New Orleans Foundation's Crescent Fund, founding member; Tulane Law School Alumni Advisory Committee, member.

LANGUAGE

Spanish, proficient

Applicant Team Roster

The Applicant Team Roster should include all identified or hired school leadership team members, governing board members and individuals that participated in the creation of the application. The evaluation team will use this roster to check for potential conflicts of interest prior to reviewing an application

There are several bases for a conflict of interest: employment, financial benefit, personal relationships, professional relationships or other interests. If applicable, any one condition may serve to disqualify a reviewer from participating in the review of an application or proposal. A conflict of interest may be real or apparent.

Name	Title	Position within Application	Email Address
Kate Mehok	CEO	Project lead	kmehok@crescentcitys
Chris Hines	COO	Contributor to applicatic	chines@crescentcitysc
Nicole Escarra	Director of Developmer	Contributor to applicatic	nescarra@crescentcity
Bob Stefani	Board Chair	Oversight	bob.stefani@crescentc
Cynthia Costello	Director of Instruction	Contributor to applicatic	ccostello@crescentcity
Katherine Chenier	Director of Evaluation a	Contributor to applicatic	kchenier@crescencitys
Chris Dufour	Board Member	Oversight	christopher.dufour@cre
Paul Frantz	Board Member	Oversight	paul.frantz@crescentci
Lakeisha Green	Board member	Oversight	lakeisha.green@cresce
Doug Harrell	Board Member	Oversight	doug.harrell@crescent
Jean Paul Hymel	Board Member	Oversight	jp.hymel@crescentcitys
Julius Kimbrough	Board Member	Oversight	julius.kimbrough@cres
Derrick O. Martin	Board Member	Oversight	frank.rabalais@crescer
Frank Rabalais	Board Member	Oversight	danielle.smith@crescer
Danielle Smith	Board Member	Oversight	morgan.williams@cres
Morgan Williams	Board Member	Oversight	jlause@crescentcitysch
Julie Lause	Principal (Tubman)	Contributor to applicatic	