

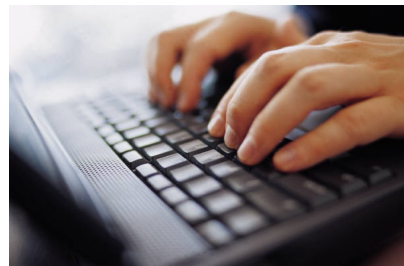


# An Overview of Online Information Resources for Grantmakers and Grantseekers

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Grants Managers Network Annual Conference  
April 7, 2008

Martin Schneiderman  
Information Age Associates  
47 Murray Place  
Princeton, NJ 08540 USA  
mbs@iaa.com  
www.iaa.com  
609-924-6936



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# Online Information Resources: Current Systems and Future Directions

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## Some Available Information Resources

- BBB Wise Giving Alliance
- Charity Navigator
- Cultural Data Project
- DonorEdge
- Foundation Directory Online (FDO)
- Foundation Search
- GuideStar
- Healthy City
- OFAC list checking services

 Give.org  
BBB Wise Giving Alliance

 CHARITY NAVIGATOR  
Your Guide To Intelligent Giving

 PENNSYLVANIA  
CULTURAL DATA  
PROJECT

 DONOR | EDGE

 FOUNDATION  
CENTER

 FoundationSearch

 GuideStar.org

 HealthyCity

 ChoicePoint

 ATUS  
Trusted Compliance Advisors

## Some Information Resources

	# of Nonprofits	# of Grantmakers	Cost
<b>BBB Wise Giving Alliance</b> (aka Give.org)	~1,700	None	Free
<b>Charity Navigator</b>	~5,200	None	Free
<b>Cultural Data Project</b> (PA, MD and CA)	~3,000 culture <i>6,500 Est. by 2009</i>	None	Free to nonprofits Fee for funders
<b>DonorEdge</b>	650 in KC <i>Being integrated with GuideStar</i>	None	Free
<b>Foundation Directory Online</b> (FDO)	132,000	88,000 detailed profiles	5 levels from \$195-\$1,295 yr
<b>FoundationSearch</b>	25,000	91,000+	\$2,500 yr
<b>GuideStar</b>	1.7 million	~30,000	4 levels from free-\$1,200 yr

# Foundation Directory Online (FDO)

Plan Features	Basic	Plus	Premium	Platinum	Professional
Complete profiles of the top 10,000 U.S. foundations including trustees, officers, and donors	✓	✓	✓	✓	✓
Daily philanthropy news and RFPs	✓	✓	✓	✓	✓
Multiple search options including keyword search and Boolean operators	✓	✓	✓	✓	✓
Descriptions of more than one million recent grants		✓	✓	✓	✓
Complete profiles of the top 20,000 U.S. foundations including trustees, officers, and donors			✓	✓	✓
Over 91,000 detailed profiles of all current U.S. grantmakers including trustees, officers, and donors				✓	✓
Profiles of more than 9,500 grantmaking public charities and nearly 1,400 corporate giving programs				✓	✓
'Search 990s' and 'Search Companies' capability					✓
Recent news, jobs, and RFPs; publications; and key staff affiliations for specific grantmakers					✓
Full-color grant distribution charts analyzing giving trends for specific grantmakers					✓
'Update Central' with new and high growth grantmakers and changes to grantmaker profiles, plus FDO Update Alerts					✓
<b>Subscription Rates</b>	\$19.95/month \$195/year	\$29.95/month \$295/year	\$59.95/month \$595/year	\$149.95/month \$995/year	\$179.95/month \$1,295/year
	<a href="#">Learn More</a>	<a href="#">Learn More</a>	<a href="#">Learn More</a>	<a href="#">Learn More</a>	<a href="#">Learn More</a>

## Some Information Resources

	# of Nonprofits	# of Grantmakers	Cost
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<b>FoundationSearch</b>	25,000	91,000+	\$2,500 yr
<b>GuideStar</b>	1.7 million	~30,000	4 levels from free-\$1,200 yr



Search Fields:	GuideStar Basic	GuideStar Select	GuideStar Premium
Org Name	X	X	X
Keyword	X	X	X
City	X	X	X
State	X	X	X
multi-select option			X
NTEE Category & Subcategory		X	X
multi-select option			X
NTEE Code		X	X
Zip/Zip Range		X	X
IRS subsection		X	X
multi-select option			X
EIN			X
Income Range			X
multit-select option			X
MSA			X
<b>Search Features:</b>			
Save Searches			X
Save Orgs			X

ORDER NOW

ORDER NOW



## Philanthropic Information Resources Data Requirements

---

- Accurate
- Comprehensive
- Consistent
- Standardized
- Uniformly classified
- Up to date
- Maintained by a respected independent source
- Cross-links to selected external sources





## Philanthropic Information Resources System Requirements

---

### ○ User Interface and Navigation

- Intuitive and easy to use
- Fully supports the latest and one prior version of Internet Explorer, Firefox and Safari browsers in default settings
- Supports Latin characters sets for names
- Meets U.S. Section 508 handicapped accessibility
- User defined e-mail and onscreen alerts
- Context sensitive help and online multimedia tutorials



## Philanthropic Information Resources System Requirements

---

### ○ Search

- Powerful and fast
- Google style “*Did you mean . . .*”
- Searchability of all data including images (e.g. 990s)
- Filtering in many different ways (e.g. categories, ranges, MSA, geography)
- Data can be tagged by individual users
- Search specifications can be modified, named and saved

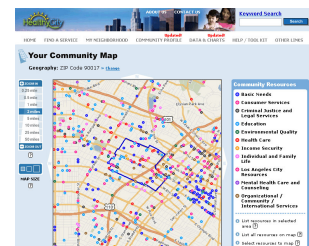
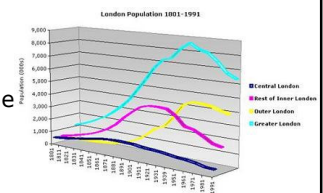
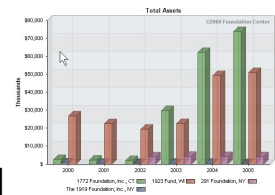
Google™



# Philanthropic Information Resources System Requirements

## Results

- Clickable cross-links and drill down capability in all result formats
- Results can be easily grouped & sorted
- Provides results in formats for trend and comparative analysis (e.g. across regions, local-state-national, organizations, and time)
- Displays data as 3D graphs and charts
- Displays high density of data in geocoded maps with zoom capability
- Data overlay "mashups" from different sources (e.g. nonprofit and grant data plus demographic data by MSA, state and congressional districts, and your own)



## Philanthropic Information Resources System Requirements

- Results
  - Data can be easily downloaded and merged with local data in industry standard formats (e.g. CSV, XLS, XML)
  - Easily cut + paste charts & graphics directly into Word without using a special graphics capture program
  - Automatic e-mail alerts and RSS feeds for key updates
- Interoperability
  - Seamless interoperability with a wide range of systems
- Usage tracking
  - Repository capability to monitor, track and analyze traffic, page hits, feature use and query specifications to enable ongoing improvements



## Philanthropic Information Resources Operational Requirements

---

- Highly reliable
- Scalable
- Comprehensive quality assurance and load testing
- Regular testing and fixing of dead links
- Continuous monitoring of detailed usage to identify patterns and needs for new and enhanced services



## Philanthropic Information Resources Business Requirements

---

- Sustainable business model that provides the optimal mix of free + fee-based access
- Users are more likely to pay for information if it can be easily merged with existing data and save a significant amount of time
- Distinguished from others in significant ways
- Complimentary win-win relationships between data providers and vendors of software/services to enable seamless links



# Demonstration of Some Information Resources

---



- ♦ Upgrade Subscription
- ♦ FAQs
- ♦ Search Tutorial
- ♦ Discount Book Mall
- ♦ Free Newsletters
- ♦ E-mail to a Friend
- ♦ FDO Talk
- ♦ Contact Us

### Search Grantmakers

 Saved Searches  Last Search

**Grantmaker Name**  
view index

**Grantmaker Location**

**State**  
view index

**County**  
view index

**City**  
view index

**Metro Area**  
view index

**Zip Code**

**Fields of Interest**  
view index

**Types of Support**  
view index

**Geographic Focus**  
view index

**Trustees, Officers, and Donors**  
view index

**Type of Grantmaker**  
view index

Total Giving

**Keyword Search**

Exclude grantmakers not accepting applications.

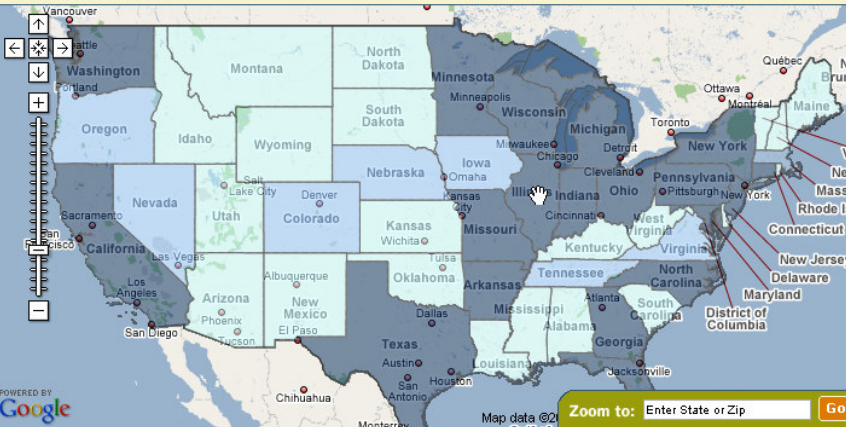
**SORT BY**

- Total Giving
- Ascending
- Total Assets
- Descending
- Alphabetic



**Illinois**

Total Giving: \$1,507,033,805



**Total Giving (Grantmakers) by State**

0 - \$100 M 
  \$100 M - \$200 M 
  \$200 M - \$300 M 
  \$300 M+ 
  N/A

- Print/Save Records
- Print/Save List
- Export List
- Save Search
- Email to a Friend
- Copy Map
- Create Table
- Revert to Last Search

**Your Criteria:**

Aggregate Philanthropic Giving: **Data:** Total Giving (Grantmakers); **Aggregate data at the:** State; **Plot:** None

Plot Grants by Subject: **Plot:** None **Year:** all **Subjects:** All

Demographic Indicator: None

**Aggregate Philanthropic Giving**

Display aggregate philanthropic data:

Total Giving (Grantmakers)

Display aggregate philanthropic data at the:

State Level

Plot Location for:

Grantmakers

Independent  Corporate

Community  Grantmaking

Public Charity

**Plot Grants by Subject**

Plot Location for:

Grantmakers

Independent  Corporate

Community  Grantmaking

Public Charity

Recipients

Year:

All  2007  2006

2005  2004  2003

Subjects:

All

Animal-related

Arts/culture/humanities

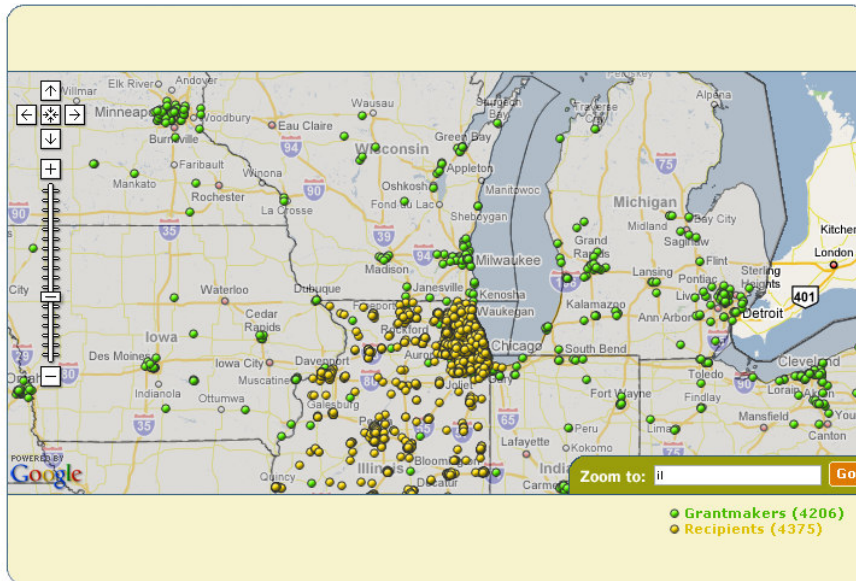
Civil rights/social action/advocacy

Community/capacity building

Education

Employment/jobs

Environmental quality/protection



### Aggregate Philanthropic Giving

Display aggregate philanthropic data:

None

Display aggregate philanthropic data at the:

State Level

Plot Location for:

- Grantmakers
- Independent  Corporate
- Community  Grantmaking Public Charity

### Plot Grants by Subject

Plot Location for:

- Grantmakers
- Independent  Corporate
- Community  Grantmaking Public Charity

Recipients

Year:

- All  2007  2006
- 2005  2004  2003

Subjects:

- All
- Animal-related
- Arts/culture/humanities
- Civil rights/social action/advocacy
- Community/capacity building
- Education
- Employment/jobs
- Environmental quality/protection

- 
- 

**Your Criteria:**

Aggregate Philanthropic Giving: **Data:** None; **Aggregate data at the:** State; **Plot:** None

Plot Grants by Subject: **Plot:** Grantmakers, Recipients; **Year:** all **Subjects:** All

Demographic Indicator: None

**Illinois**  
**Total Giving: \$1,507,033,805 Total Assets: \$24,439,965,970**  
**Gifts Received: \$1,188,338,878 Number of Grants: 46,105**

**Recipient**  
 Abraham Lincoln Centre  
 3858 S. Cottage Grove Ave.  
 Chicago, IL 60653-2096  
[See full profile](#)

Zoom to: 60653

● Grantmakers (4206)  
 ● Recipients (4375)

**Recipient Info - Windows In...**

http://insight.velir.com/RecipientInfo.aspx?Key=78383

**Abraham Lincoln Centre**  
 3858 S. Cottage Grove Ave.,  
 Chicago, IL 60653-2096  
 County: Cook County  
 URL: <http://www.abelink.org/>

**Type of Recipient**  
 Neighborhood centers  
 EIN  
 362167774

**Financial Data**  
 Tax Period: 06/2006  
 Total Assets: \$2,783,938  
 Total Income: \$11,687,085

**Other**  
 Auspice: Private nonsectarian organization  
 Ruling Date: 04/1925  
 IRS classification: Charitable organization  
 Deductibility status: Contributions are deductible  
 Affiliation status: Independent  
 Foundation designation: Org recvg funds from govt or public  
 Organization designation: Corporation

Internet 100%

**Illinois**  
**Total Giving:** \$1,507,033,805 **Total Assets:** \$24,439,965,970  
**Gifts Received:** \$1,188,338,878 **Number of Grants:** 46,105

**Grantmaker**  
 Chicago White Sox Charities, Inc.  
 333 W. 35th St.  
 Chicago, IL 60616-3621  
[See full profile](#)

Zoom to: 60653

POWERED BY: Google

**Grantmaker Info - Windows Internet Explorer**  
 http://insight.velir.com/GrantmakerInfo.aspx?Key=CHIC047

**Chicago White Sox Charities, Inc.**  
 333 W. 35th St.,  
 Chicago, IL 60616-3621  
 County: Cook County  
 Telephone: (312) 674-5387  
 Additional info: FAX: (312) 674-5119  
 E-mail: [coreilly@chisox.com](mailto:coreilly@chisox.com)  
 URL: <http://chicago.whitesox.mlb.com/NASApp/mlb/cws/community/index.jsp?program=charities>  
 Established: 1990

**Type of Grantmaker**  
 Public charity

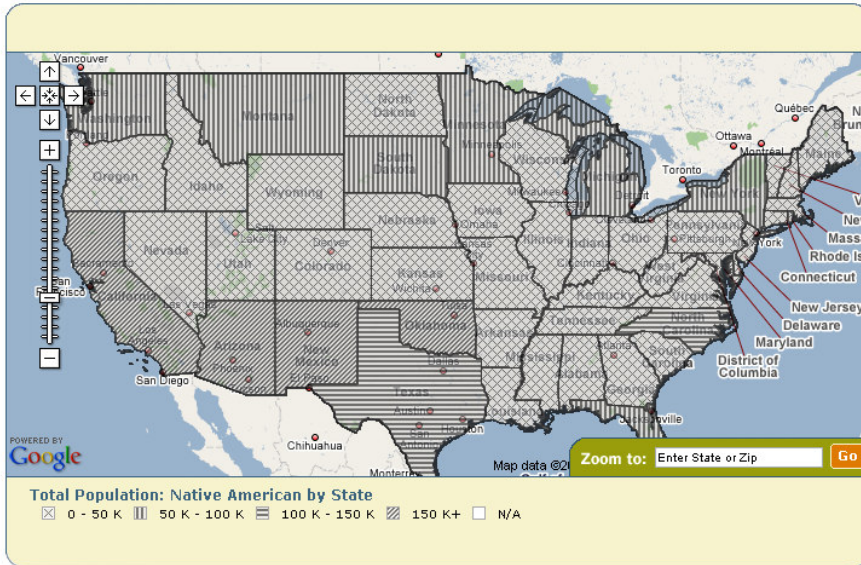
**Purpose**  
 The charity supports various cancer research and treatment programs, organizations serving children and families in need, and programs for senior citizens.

**EIN**  
 363719918

**Financial Data**  
 Fiscal Year Ended: 1/31/2006  
 Gifts Received: \$643,432  
 Expenditures: \$1,256,510  
 Total Assets: \$3,062,925  
 Total Giving: \$730,239  
 Number of Grants: 41

**List of Recipients**

Done Internet 100%



- [Print/Save Records](#) [Print/Save List](#) [Export List](#) [Save Search](#)
- [Email to a Friend](#) [Copy Map](#) [Create Table](#) [Revert to Last Search](#)

**Your Criteria:**  
 Aggregate Philanthropic Giving: **Data:** None; **Aggregate data at the:** State; **Plot:** None  
 Plot Grants by Subject: **Plot:** None **Year:** all **Subjects:** All  
 Demographic Indicator: Total Population: Native American

**Aggregate Philanthropic Giving**

Display aggregate philanthropic data:

None

Display aggregate philanthropic data at the:

State Level

Plot Location for:

Grantmakers

Independent  Corporate  
 Community  Grantmaking  
 Public Charity

**Clear** **Refresh**

**Plot Grants by Subject**

**Add a Demographic Indicator**

Select an indicator below:



(None)  
 Education  
 Income  
 Employment  
 Households  
 Population

Total Population  
 White Only  
 African American Only  
 Hispanic Only  
 Asian Only  
 Native American Only

**Clear** **Refresh**

# Foundation Center Trend Tracker

## Individual Grantmaker Analysis Results

 [Export to Excel](#)  
 [Email to a friend](#)

### Total Assets

Year	Illinois Tool Works Foundation, IL	Chicago Sun-Times Charity Trust, IL	Chicago Tribune Foundation, IL	Chicago Mercantile Exchange Foundation, IL
2000	\$11,380,392	\$1,329,100	\$7,163,024	
2001	\$7,000,000	\$1,507,971	\$6,001,961	
2002	\$2,201,385	\$1,676,711	\$6,132,186	\$404,748
2003	\$13,736,827	\$1,933,663	\$6,131,103	\$0
2004	\$16,867,481	\$2,104,895	\$4,425,784	\$223,290
2005	\$21,916,937	\$2,025,022	\$2,871,742	\$26,685
<b>Total</b>	<b>\$73,103,022</b>	<b>\$10,577,362</b>	<b>\$32,725,800</b>	<b>\$654,723</b>

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Change Format:  bar chart  line chart  data table

[Modify Analysis](#)

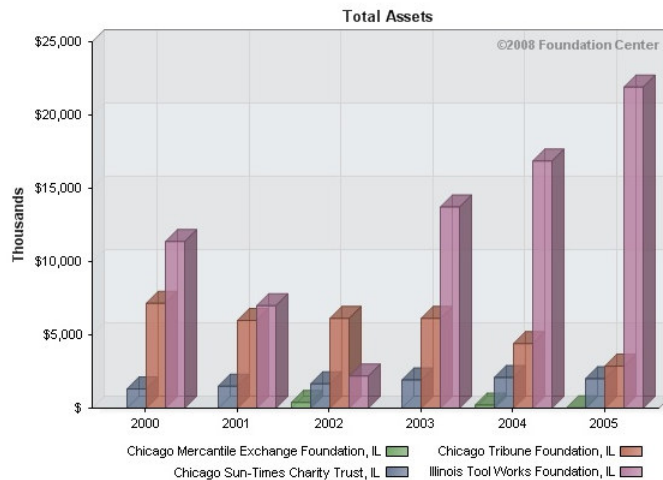
[New Analysis](#)

Source: <http://charts.foundationcenter.org/iodaweb/indGrants.aspx>

# Foundation Center Trend Tracker

Individual Grantmaker Analysis Results

[Display PDF](#)  
[Email to a friend](#)



Change Format:  bar chart     line chart     data table

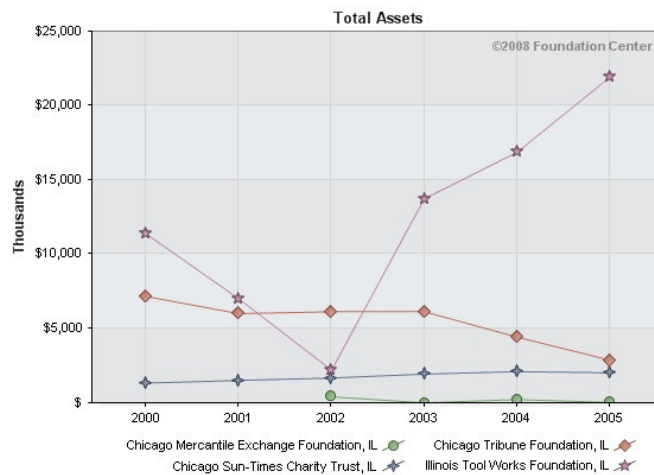
[Modify Analysis](#)

[New Analysis](#)

# Foundation Center Trend Tracker

Individual Grantmaker Analysis Results

[Display PDF](#)  
[Email to a friend](#)



Change Format:  bar chart  line chart  data table

[Modify Analysis](#)

[New Analysis](#)



# FoundationSearch America

MEMBER SERVICES HOME HOW TO JOIN HELP ABOUT US CONTACT GLOBAL SEARCH (Beta) LOGOUT

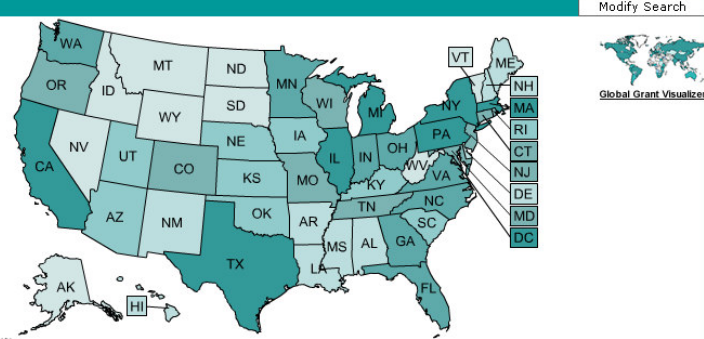
 Mar 27, 2007

Home > Grant Visualizer

<a href="#">Grant Visualizer</a>	<a href="#">Grant Analyzer</a>	<a href="#">Foundation Visualizer</a>	<a href="#">Foundation Search</a>	<a href="#">Foundation Profile Keyword Search</a>	<a href="#">990PF Keyword Search</a>	<a href="#">FoundationNews Search</a>	<a href="#">My Foundation Manager</a>
----------------------------------	--------------------------------	---------------------------------------	-----------------------------------	---	--------------------------------------	---------------------------------------	---------------------------------------

Grant Total: \$167,469,199,000      Number of Grants: 3,297,873

[Modify Search](#)



**Legend (\$):**

- 100,000,000 - 455,000,000
- 455,000,000 - 700,000,000
- 700,000,000 - 1,100,000,000
- 1,100,000,000 - 3,300,000,000
- 3,300,000,000 - 5,000,000,000

View Mode: [Map](#) | [Grant Amount](#) | [Grants Received](#)

*Right click on map to zoom*

<b>From State:</b> All States Alabama Alaska	<b>Granting Yr:</b> All Years 2006 2005 2004 2003	<b>Granting Category:</b> All Categories Arts & Culture Community Development Education Environment Health International Giving Religion	<b>Grant Size:</b> All Grant Sizes \$1 to \$9,999 \$10,000 to \$24,999 \$25,000 to \$99,999 \$100,000 to \$499,999 \$500,000 to \$999,999 \$1,000,000 to \$4,999,999 \$5,000,000 to \$9,999,999	<input type="button" value="Go"/> <input type="button" value="Reset"/>
---	--	--	---	---

Use Ctrl + click to select multiple ranges

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[info@foundationsearch.com](mailto:info@foundationsearch.com)



Home > Grant Visualizer

<a href="#">Grant Visualizer</a>	<a href="#">Grant Analyzer</a>	<a href="#">Foundation Visualizer</a>	<a href="#">Foundation Search</a>	<a href="#">Foundation Profile Keyword Search</a>	<a href="#">990PF Keyword Search</a>	<a href="#">FoundationNews Search</a>	<a href="#">My Foundation Manager</a>
----------------------------------	--------------------------------	---------------------------------------	-----------------------------------	---	--------------------------------------	---------------------------------------	---------------------------------------

Grant Total: \$167,469,199,000      Number of Grants: 3,297,873

Modify Search    Save to My Searches

Category	Total Number of Grants
Miscellaneous Philanthropy	374,21k
Education	834,89k
Health	293,14k
Social & Human Services	502,46k
International Giving	96,5k
Environment	134,31k
Arts & Culture	370,63k
Religion	301,06k
Community Development	274,04k
Sports & Recreation	27,72k

View Mode:     Category:     Number of Grants:     Vertical Bar(3D):

*Right click on chart to zoom*

<b>From State:</b>	<b>Granting Yr:</b>	<b>Granting Category:</b>	<b>Grant Size:</b>	<input type="button" value="Go"/>
All States	All Years	All Categories	All Grant Sizes	<input type="button" value="Reset"/>
Alabama	2006	Arts & Culture	\$1 to \$9,999	
Alaska	2005	Arts & Culture	\$10,000 to \$24,999	
	2004	Community Development	\$25,000 to \$99,999	
	2003	Education	\$100,000 to \$499,999	
	2002	Environment	\$500,000 to \$999,999	
	2001	Health	\$1,000,000 to \$4,999,999	
	2000	International Giving	\$5,000,000 to \$9,999,999	
		Religion		

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- ▶ [GuideStar Basic Demo](#)

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Verify status, access detailed reports on an organization's performance, investigate compensation, research grant activity, and more. [Learn more](#)

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- ▶ Nonprofit & Donation Search
- ▶ People Search

**SEARCH**

Keyword

---

**Organization Name/Location**

Name

City

State(s) 

- Alabama
- Alaska
- American Samoa
- Arizona

To select multiple states hold Ctrl and click with mouse.

Zip

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1,312 organizations found (0.421 seconds)  
 1 - 25 of 1,000 organizations are returned. [Need to refine?](#)

Sort By: Relevancy

Page: 1 2 3 4 5 >>

**Download Options**

+ [Add all 1,000 organizations to My Download List](#) [View/Download My List](#)

**Global Fund to Fight AIDS Tuberculosis and Malaria**

UN Foundation/Global Fund  
 Washington, DC 20090

+ [Add to My Download List](#)  
 + [Add to My GuideStar](#)

The Global Fund's purpose is to attract, manage and disburse resources to fight AIDS, TB and malaria.

**Documents:** [Form 990](#)

**EIN:** 98-0380092 **Income:** \$1,420,959,869 (from IRS Form 990)  
**IRS Subsection:** [501\(c\)\(3\) Public Charity](#)

**NTEE Code:** [H81 \(AIDS\)](#)

**IRS Publication 78:** Verified—[See GuideStar Charity Check details](#)

**Deductibility Code:** 8

**GuideStar It!**  
 YOUR SEARCH

**What you're searching:**

Keywords - global health

• Add other refinements from the links below.  
 • Click "x" to remove.

**REFINE BY CATEGORY**

- + [State](#)
- + [City](#)
- + [IRS Subsection](#)
- + [NTEE](#)
- + [MSA](#)
- + [Income](#)

**SAVED SEARCHES**

Name your search:

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Search Results | New Search

**Download Options**

**Global Fund to Fight AIDS Tuberculosis and Malaria**


Also Known As: TGF  
UN Foundation/Global Fund  
PO Box 96615  
Washington, DC 20099

**GuideStar Charity Check**

PDF print This report was generated on April 15, 2008, at 10:31 AM

FAOs

**IRS Publication 78 Details**

**Organization Name** Global Fund to Fight AIDS Tuberculosis and Malaria 

**EIN** 98-0380092


**Location** Geneva, Switzerland

**Code and Description** 8 - A foreign-addressed organization.

**Most Recent IRS Publication 78** March 2008

**Verified with Most Recent Internal Revenue Bulletin** April 14, 2008

**IRS Business Master File Details**

**Organization Name** GLOBAL FUND TO FIGHT AIDS TUBERCULOSIS AND MALARIA 

**EIN** 98-0380092

**Most Recent IRS BMF** April 2008

**IRS Subsection** This organization is a 501(c)(13) Public Charity.

**Reason for Non-Private Foundation Status** Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(v)

**Ruling Date** 11/2002

An Advance Ruling Expiration date is not applicable to this organization, or the organization has already been awarded a final determination by the IRS.

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- Saved Searches

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Verify status, access detailed reports on an organization's performance, investigate compensation, research grant activity, and more.

**ANALYST REPORT**

A GuideStar Analyst Report is available for this organization.

**FINANCIAL DATA**

- Financial Data for:**
- Fiscal Year Ending 2005
  - Fiscal Year Ending 2004
  - Fiscal Year Ending 2003
  - Fiscal Year Ending 2002

**Revenues and Expenses: Fiscal Year Ending December 31, 2005**

REVENUE	EXPENSES
Contributions \$1,958,339	Program Services \$1,561,991,514
Government Grants \$1,360,460,290	Administration \$6,077,610
Program Services \$0	Other \$3,616,962
Investments \$59,941,240	<b>Total Expenses \$1,571,286,093</b>
Special Events \$0	Net Gain/Loss (\$150,326,224)
Sales \$0	
Other \$0	
<b>Total Revenue \$1,420,959,869</b>	

**Balance Sheet: Fiscal Year Ending December 31, 2005**

Note: The balance sheet gives a snapshot of the financial health of an organization at a particular point in time. An organization's total assets should generally exceed its total liabilities, or it cannot long survive, but the types of assets and liabilities also must be considered. For instance, an organization's current assets (cash, receivables, securities, etc.) should be sufficient to cover its current liabilities (payables, deferred revenue, current year loan and note payments). Otherwise, the organization may face solvency problems. On the other hand, an organization whose cash and equivalents greatly exceed its current liabilities might not be putting its money to best use.

ASSETS	January 1, 2005	December 31, 2005	Change
Cash & Equivalent	\$2,444,408,158	\$2,732,232,219	\$287,824,061
Accounts Receivable	\$0	\$0	\$0
Pledges & Grants Receivable	\$222,442,816	\$225,085,138	\$2,642,322
Receivable / Other	\$0	\$0	\$0
Inventories for Sale of Use	\$0	\$0	\$0
Investment/Securities	\$0	\$0	\$0
Investment/Other	\$0	\$0	\$0
Fixed Assets	\$0	\$0	\$0
Other	\$5,705,839	\$77,136,283	\$71,430,444
<b>Total Assets</b>	<b>\$2,672,556,813</b>	<b>\$3,034,453,640</b>	<b>\$361,896,827</b>
LIABILITIES	January 1, 2005	December 31, 2005	Change
Accounts Payable	\$4,235,532	\$5,026,877	\$791,345
Grants Payable	\$1,110,086,815	\$1,565,032,660	\$454,945,845
Deferred Revenue	\$0	\$0	\$0
Loans and Notes	\$0	\$0	\$0
Tax-Exempt Bond Liabilities	\$0	\$0	\$0
Other	\$0	\$0	\$0
<b>Total Liabilities</b>	<b>\$1,114,322,347</b>	<b>\$1,570,059,537</b>	<b>\$455,737,190</b>
<b>FUND BALANCE</b>	<b>\$1,558,234,466</b>	<b>\$1,464,394,103</b>	<b>(\$93,840,363)</b>

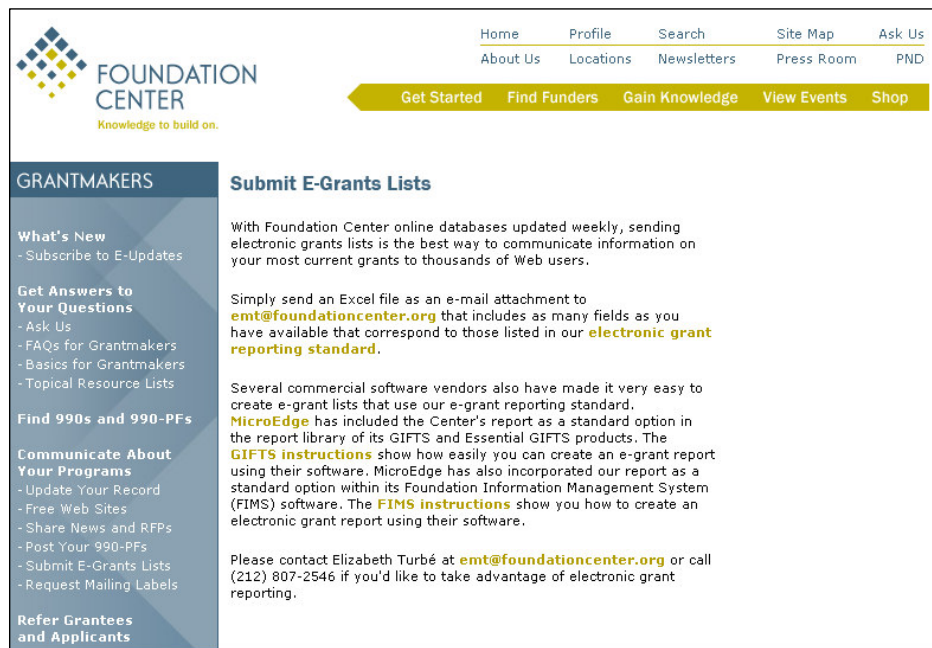


# Linking Foundation Data with External Systems

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# Instructions for Submitting Up-to-date Electronic Reports



The screenshot shows the Foundation Center website. At the top left is the logo with the tagline "Knowledge to build on." Navigation links include Home, Profile, Search, Site Map, Ask Us, About Us, Locations, Newsletters, Press Room, and PND. A yellow bar contains links for Get Started, Find Funders, Gain Knowledge, View Events, and Shop. The main content area is titled "GRANTMAKERS" and "Submit E-Grants Lists". It includes sections for "What's New", "Get Answers to Your Questions", "Find 990s and 990-PFs", "Communicate About Your Programs", and "Refer Grantees and Applicants". The "Submit E-Grants Lists" section contains text about sending electronic grants lists via email to [emt@foundationcenter.org](mailto:emt@foundationcenter.org) and mentions software vendors like MicroEdge and FIMS.

# Electronic Grant Reporting Standard

## Submit E-Grants Lists

The following describes various types of information that can be included in an electronic grants list. You only need to include those you have available in your own grants management system. Contact Elizabeth Turb  at [emt@foundationcenter.org](mailto:emt@foundationcenter.org) or call (212) 807-2546 if you have any questions about creating and sending an electronic grants file.

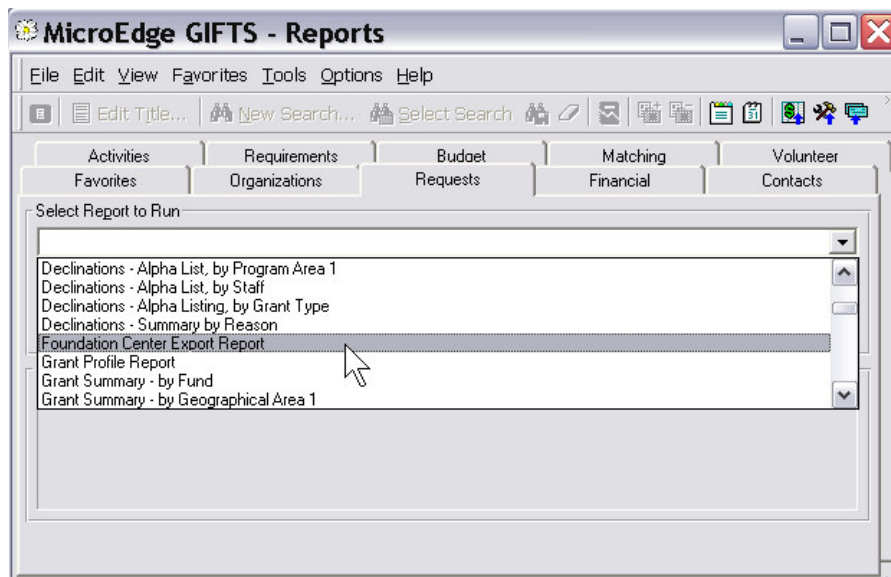
Items 1-14 are more basic grant information. Items 15-25 contain information that will help us describe your grants from the perspective of your own programs. Finally, items 26 and 27 will let us better represent total support awarded by community foundations.

1	Grantee organization name	Organization's name as officially recognized (by the IRS for U.S. organizations)
2	Unique grant number	Unique grant number used by the foundation to identify the grant (to be used for reconciliation purpose only)
3	Grantee unit	Subdivision or department of grantee to which grant is awarded
4	Grantee street address	Primary street address
5	Grantee city	City location of grantee
6	Grantee state	State or province
7	Grantee zip or foreign mailing code	5- or 9-digit zip code or foreign alpha-numeric mailing code
8	Grantee country	To be used <i>only</i> for foreign grantees
9	Grantee Employer Identification Number (EIN)	9-digit number assigned to each U.S. grantee by the IRS
10	Grant description	Summarizes the specific purpose or objective of the grant
11	Authorized grant amount	Full amount of authorized grant in U.S. dollars at time of initial authorization
12	Grant authorization year	Foundation/giving program's fiscal year-end date in which grant was authorized

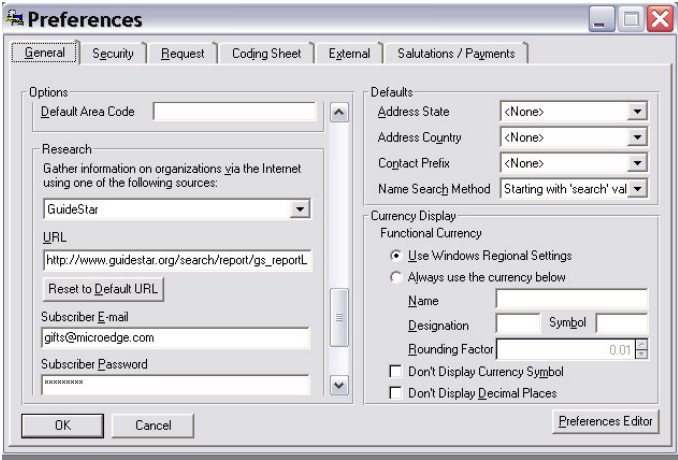
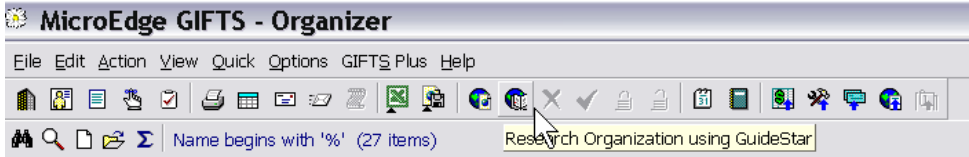
Over 140 foundations report detailed grant information electronically today



# GIFTS Built-in Foundation Center Export Report



# MicroEdge GIFTS Integral Link to GuideStar



# Online Resources to Verify a Nonprofit's Current Charity Status

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

Date: JUN 20 2003

ARCHITECTURE FOR HUMANITY  
165 W 20TH ST 2A  
NEW YORK, NY 10011

DEPARTMENT OF THE TREASURY

Employer Identification Number:  
30-058297  
EIN:  
1765181201667  
Contact Person:  
VICTORIA LAMBY ID# 31364  
Contact Telephone Number:  
(877) 829-5509  
Accounting Period Ending:  
December 31  
Foundation Status Classification:  
509(a)(1)  
Advance Ruling Period Begins:  
January 16, 2003  
Advance Ruling Period Ends:  
December 31, 2006  
Advance Applies:  
No

Dear Applicant:

Based on information you supplied and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in sections 509(a)(1) and 170(b)(5)(A)(vi).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(B) and 510.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and contributors may continue to rely on the advance determination until we make

Letter 1045 (06/03)

IRS regulations state that a copy of a letter of determination is insufficient

# GuideStar Charity Check

## Philanthropic Research, Inc. aka GuideStar

Also Known As: GuideStar  
4801 Courthouse Street  
Ste 220  
Williamsburg, VA 23188

### GuideStar Charity Check



This report was generated on April 9, 2007, at 2:36 PM

[FAQs](#)

[GuideStar Charity Check Data Sources](#)

### IRS Publication 78 Details

<b>Organization Name</b>	Philanthropic Research Inc.	
<b>EIN</b>	54-1774039	
<b>Location</b>	Williamsburg , VA	
<b>Code and Description</b>	None - A public charity with a 50% deductibility limitation	
<b>Most Recent IRS Publication 78</b>	April 2007	
<b>Verified with Most Recent Internal Revenue Bulletin</b>	April 9, 2007	

### IRS Business Master File Details

<b>Organization Name</b>	PHILANTHROPIC RESEARCH INC	
<b>EIN</b>	54-1774039	
<b>Most Recent IRS BMF</b>	April 2007	
<b>IRS Subsection</b>	This organization is a <a href="#">501(c)(3)</a> Public Charity.	
<b>Reason for Non-Private Foundation Status</b>	Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)	
<b>Ruling Date</b>	08/1996	

An Advance Ruling Expiration date is not applicable to this organization, or the organization has already been awarded a final determination by the IRS.

The IRS allows grantors to use third party resources, like GuideStar Charity Check, to obtain required Business Master File (BMF) information about a potential grantee's public charity classification under section 509 (a)(1),(2), or (3). Click [here](#) to review the official IRS statement on BMF Reliance.

## GuideStar Charity Check

### Due Diligence, Quick & Easy!

GuideStar Charity Check is a one-stop, comprehensive solution that simplifies an increasingly complex grantmaking due diligence process. With two clicks, grantmakers can verify a nonprofit's charitable status and identify supporting organizations. Search by name or EIN to find the organizations you want quickly and easily.

GuideStar Charity Check is 100% compliant with IRS guidelines for verifying charitable status and identifying supporting organizations.

Starting at \$75

[VIEW SAMPLE](#) [SUBSCRIBE NOW](#)

Philanthropic Research, Inc. aka GuideStar  
Also Known As: GuideStar  
4091 Courthouse Street  
Ste 220  
Williamsburg, VA 23188

**GuideStar Charity Check**  
PDF print This report was generated on April 9, 2007, at 2:36 PM  
FAQs [GuideStar Charity Check Data](#)

**IRS Publication 78 Details**

Organization Name	Philanthropic Research Inc.
EIN	54-1774039
Location	Williamsburg, VA
Code and Description	None - A public charity with a 50% deductibility limit
Most Recent IRS Publication 78	April 9, 2007
Verified with Most Recent Internal Revenue Bulletin	April 9, 2007

**IRS Business Master File Details**

Organization Name	PHILANTHROPIC RESEARCH INC
EIN	54-1774039
Most Recent IRS BMF	April 2007

**IRS Subsection** This organization is a 501(c)(3) Public Charity.  
**Reason for Non-Private Foundation Status** Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(ii)  
**Rolling Date** 06/29/96

### Access IRS Publication 78 & BMF Information

GuideStar Charity Check integrates multiple IRS data sources into one easy-to-read report. GuideStar acquires all IRS data directly from the most recent Internal Revenue Service listings.

### Identify Supporting Organizations

Determine an organization's reason for non-private foundation status under section 509(a)(1), (2), or (3).

Most Recent IRS Publication 78 April 2007  
Verified with Most Recent Internal Revenue Bulletin April 9, 2007

**IRS Business Master File Details**

Organization Name	PHILANTHROPIC RESEARCH INC
EIN	54-1774039
Most Recent IRS BMF	April 2007

**IRS Subsection** This organization is a 501(c)(3) Public Charity.  
**Reason for Non-Private Foundation Status** Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(ii)  
**Rolling Date** 06/29/96

In Advance Ruling Expiration date is not applicable to this organization, or the organization has already been awarded a final determination by the IRS.

Philanthropic Research, Inc. aka GuideStar  
Also Known As: GuideStar  
4091 Courthouse Street  
Ste 220  
Williamsburg, VA 23188

**GuideStar Charity Check**  
PDF print This report was generated on April 9, 2007, at 2:36 PM  
FAQs [GuideStar Charity Check Data](#)

**IRS Publication 78 Details**

Organization Name	Philanthropic Research Inc.
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### Document Your Verification Process

Create an audit trail by printing or saving a date- and time-stamped report.

<http://www.irs.gov/charities/charitable/article/0,,id=168531,00.html>

# Bromelkamp Pearl Link to GuideStar Charity Check

The screenshot shows a software window titled "Grants Management : Form". The main window has a "Chronicle" tab and contains the following fields:

- App: 0003 Program: Project Support Status: Awarded
- Request: \$4,000.00 Dec: 3/25/2005 Grant: \$4,000.00 Title: New seedlings for Rogers Park
- Name: Whittier Neighbors Ser: 7 Updated: 9/11/2007 Henry
- Applicant: Project Process Interests Payments/Reports Roles Scholarship Applications
- Dept: Addr1: 3409 Forest Ave. City: Champlain Tel: TaxID: 41-1906888 OrgDesc:
- Contact: Martin^Richard Sal: Mr. Martin Updated: 4/8/2003 Bennett ConTitle: President ConEmail: Richard@greentrees.org Num: 6 ConTel: mConTel: oConTel: Auth:

A dialog box titled "Pearl Link to GuideStar.org" is overlaid on the form. It contains the following text:

CharityCheck report was last saved on 6/22/2007.  
Do you want to attach a PDF copy of the CharityCheck report in Constituent Chronicle?

The dialog box has "Yes" and "No" buttons.

At the bottom of the main window, it says "Record: 3 of 27".

# Bromelkamp Pearl Copy of GuideStar Charity Check Report

**Pearl CLIST Chronicle**

All Ser One Ser 7: Whittier Neighbors

Events Attachments

CLIST-7 CharityCheck 2007-06-22 2257 Whittier Neighbors.  
 CLIST-7 CharityCheck 2008-02-29 1411 Whittier Neighbors.

**GuideStar**  
Charity Check Report

Whittier Neighbors Inc.  
2829 Garfield Ave S  
Minneapolis, MN 55405

Double-click on this image to open it for printing or export

**GuideStar Charity Check**

This report was run on February 27, 2008 at 11:57 PM

**IRS Publication 78 Details**

The organization (EIN 41 1906888) does not meet IRS criteria for appearing in Publication 78.

There are many reasons why an organization may not appear. Go to the Search IRS Publication 78 for more details.

**IRS Business Master File Details**

Organization Name	WHITTIER NEIGHBORS INC
EIN	41 1906888
Most Recent IRS BMP	February 2008
IRS Subsection	This organization is a 501(c)(3) Public Charity.
Reason for Non-Private Foundation Status	Section 509(a)(1) organization as referred to in Section 170(b)(1)(F)(iii)
Ruling Date	03/19/06

Updated: 2/29/2008 2:12:00 PM

Open Delete Attach Scan

An Advance Ruling Expiration date is not applicable to this organization, or the organization has already been

# GIFTS Plus Pack Tax Status Plus

Organization	Primary Contact	AKA	Legal Name
Abuse Prevention and Rehabilitation Fund 440 Third Street Washington, DC 20001	Elizabeth Lawson Tel: (202) 555-2343 Fax: (202) 555-2300 lawson@abuseprevention.org		Abuse Preve
Adventure Club of Manhattan 30 E. 62 St New York, NY 10021	Adrienne Vittori Tel: (212) 323-8767 Fax: (212) 323-8777 vittoria@acofm.org	Club "Avant-Tour"	Adventure Cl
Arlington School of Dentistry 122 South Ave. Arlington Hall Los Angeles, CA 34253	Anita Rayse Tel: (203) 771-1265 Fax: (203) 771-1233 raysea@franklinstateuniversity.org	Franklin State University	Arlington Sch



## Links to IRS Business Master File (BMF) to Check Organization Tax Status and Identify Mismatching Tax IDs

**Tax Status Results - Not Matched**

You can update the tax status of each Organization with details from their matching Organization. Click Details to see what new data will be added to the Organization

	GIFTS Organization	Matching Organization	Tax ID	Current Tax Status	New Tax Status	See Details
<input type="checkbox"/>	Abuse Prevention and Rehab	American National Red Cross	53-0196605		501(c)3	<a href="#">Details</a>
<input type="checkbox"/>	Adventure Club of Manhattan	National Geographic Society	53-0193519		501(c)3	<a href="#">Details</a>
<input type="checkbox"/>	Arlington School of Dentistry	Council On Foundations Inc	13-6068327		501(c)3	<a href="#">Details</a>

Select All   Deselect All   Print...   Update   Close

## Some U.S. PATRIOT Act and OFAC Compliance Verification Databases

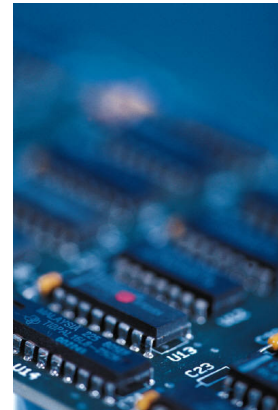
- Attus OFAC Watchdog
- ChoicePoint Bridger Insight
- Equifax
- GuideStar Charity Check
- OFACSearch
- RDC (Regulatory Data Corporation)
  - GRID (Global Regulatory Information Database)



## Why Use Computers for Compliance Checking?

---

Compliance checking requires perfect execution of a boring and repetitive task – one that a computer does well and people do poorly.



## U.S. Library of Congress Spellings of the Libyan Leader's Name قذافي

- |                            |  |                                     |
|----------------------------|--|-------------------------------------|
| (1) Muammar Qaddafi        |  | (18) Mu'ammar Qadhahafi             |
| (2) Mo'ammarr Gadhafi      |  | (19) Muammar Khaddafi               |
| (3) Muammar Kaddafi        |  | (20) Muammar al-Khaddafi            |
| (4) Muammar Qadhafi        |  | (21) Mu'amar al-Kadafi              |
| (5) Moammarr El Kadhafi    |  | (22) Muammar Ghaddafi               |
| (6) Muammar Gadafi         |  | (23) Muammar Ghadafi                |
| (7) Mu'ammar al-Qadafi     |  | (24) Muammar Ghaddafi               |
| (8) Moamer El Kazzafi      |  | (25) Muamar Kaddafi                 |
| (9) Moamar al-Gaddafi      |  | (26) Muammar Quathafi               |
| (10) Mu'ammar Al Qathafi   |  | (27) Muammar Gheddari               |
| (11) Muammar Al Qathafi    |  | (28) Muamar Al-Kaddafi              |
| (12) Mo'ammarr el-Gadhafi  |  | (29) Moammarr Khadafy               |
| (13) Moamar El Kadhafi     |  | (30) Moammarr Qudhafi               |
| (14) Muammar al-Qadhafi    |  | (31) Mu'ammar al-Qaddafi            |
| (15) Mu'ammar al-Qadhahafi |  | (32) Mulazim Awwal Mu'ammarr        |
| (16) Mu'ammar Qadafi       |  | (33) Muhammad Abu Minyar al-Qadhafi |
| (17) Moamar Gaddafi        |  |                                     |

## Excerpt of the OFAC List

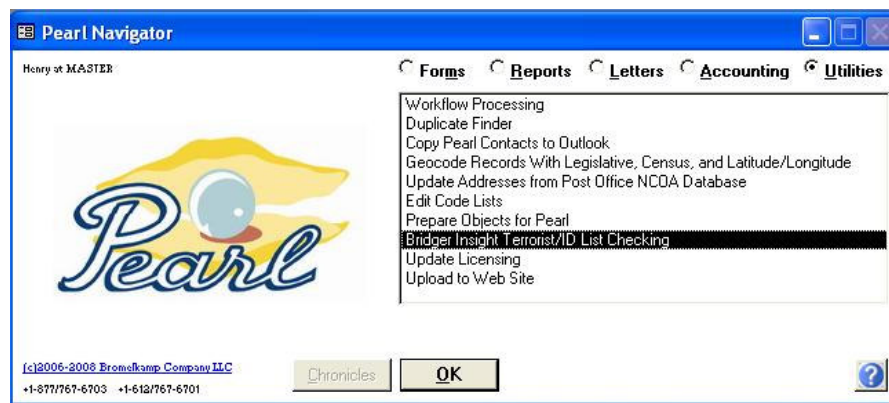
MALARBE, Oscar (a.k.a. BECERRA, Martin; a.k.a. BECERRA MIRELES, Martin; a.k.a. MACHERBE, Oscar; a.k.a. MAHERBE, Oscar; a.k.a. MAHLERBE, Oscar; a.k.a. MAHLERBE, Polo; a.k.a. MALERBE, Oscar; a.k.a. MALERHBE DE LEON, Oscar; a.k.a. MALERVA, Oscar; a.k.a. MALHARBE DE LEON, Oscar; a.k.a. MALHERBE DE LEON, Oscar; a.k.a. MALHERBE DELEON, Oscar; a.k.a. MALMERBE, Oscar; a.k.a. MELARBE, Oscar; a.k.a. NALHERBE, Oscar; a.k.a. QALHARBE DE LEON, Oscar; a.k.a. VARGAS, Jorge); DOB 10 Jan 1964; POB Mexico (individual)  
[SDNTK]

MALERBE, Oscar (a.k.a. BECERRA, Martin; a.k.a. BECERRA MIRELES, Martin; a.k.a. MACHERBE, Oscar; a.k.a. MAHERBE, Oscar; a.k.a. MAHLERBE, Oscar; a.k.a. MAHLERBE, Polo; a.k.a. MALARBE, Oscar; a.k.a. MALERHBE DE LEON, Oscar; a.k.a. MALERVA, Oscar; a.k.a. MALHARBE DE LEON, Oscar; a.k.a. MALHERBE DE LEON, Oscar; a.k.a. MALHERBE DELEON, Oscar; a.k.a. MALMERBE, Oscar; a.k.a. MELARBE, Oscar; a.k.a. NALHERBE, Oscar; a.k.a. QALHARBE DE LEON, Oscar; a.k.a. VARGAS, Jorge); DOB 10 Jan 1964; POB Mexico (individual)  
[SDNTK]

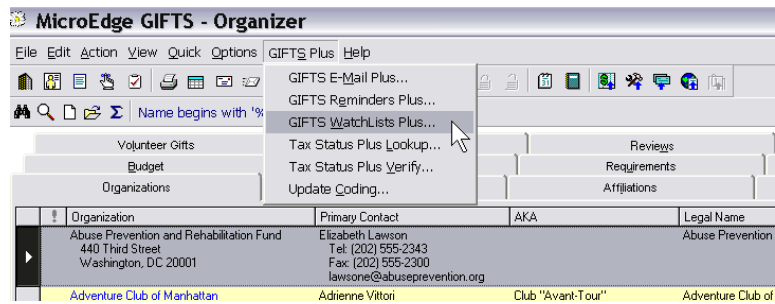
MALERHBE DE LEON, Oscar (a.k.a. BECERRA, Martin; a.k.a. BECERRA MIRELES, Martin; a.k.a. MACHERBE, Oscar; a.k.a. MAHERBE, Oscar; a.k.a. MAHLERBE, Oscar; a.k.a. MAHLERBE, Polo; a.k.a. MALARBE, Oscar; a.k.a. MALERBE, Oscar; a.k.a. MALERVA, Oscar; a.k.a. MALHARBE DE LEON, Oscar; a.k.a. MALHERBE DE LEON, Oscar; a.k.a. MALHERBE DELEON, Oscar; a.k.a. MALMERBE, Oscar; a.k.a. MELARBE, Oscar; a.k.a. NALHERBE, Oscar; a.k.a. QALHARBE DE LEON, Oscar; a.k.a. VARGAS, Jorge); DOB 10 Jan 1964; POB Mexico (individual)  
[SDNTK]

Source	Product / Service	OFAC Verification Lists	Features	Cost
<b>U.S. Treasury Department</b> <a href="http://www.treas.gov/offices/eot/ffc/ofac/">www.treas.gov/offices/eot/ffc/ofac/</a>	OFAC lists (only manually downloadable lists)	OFAC (organizations, individuals, vessels)	None	Free
<b>Attus</b> <a href="http://www.attustech.com">www.attustech.com</a>	OFACWatchDog™ (Windows or Web)	OFAC (organizations, individuals, vessels and domain names) plus option of multiple other lists	Language sensitive searches, automated list updating, list checking, accept list, audit trail, Web service integration	\$499/year (single user) \$699/year (network user) These are reduced prices for grantmaking organizations
<b>ChoicePoint Bridger Insight</b> <a href="http://www.choicepoint.com">www.choicepoint.com</a>	ChoicePoint Bridger Insight (Windows or Web)	OFAC (organizations, individuals, vessels) and multiple other lists	Automated list updating, list checking and accept list, audit trail	Starts at \$735 (Windows) and \$895 (Web) – also varies depending on number of supported nonprofits. 15% discount available to MicroEdge clients
<b>GuideStar</b> <a href="http://www.guidestar.org">www.guidestar.org</a>	GuideStar Basic and GuideStar Charity Check (both Web)	OFAC (organization names only)	Manual check of one organization at a time	The free GuideStar Basic and all fee-based services (prices vary) provide OFAC checking of individual organization names
<b>The Oasis Group</b> <a href="http://www.ofacsearch.com">www.ofacsearch.com</a>	OFACSearch (Web and Service)	OFAC (organizations, individuals, vessels, domain names)	Automatic list updating, list checking, accept list, audit trail, language sensitive searches, Web service integration	\$400/year This is a reduced price for grantmaking organizations

# Bromelkamp Pearl Bridger Insight Organization Data for OFAC Checking



# GIFTS WatchLists Plus



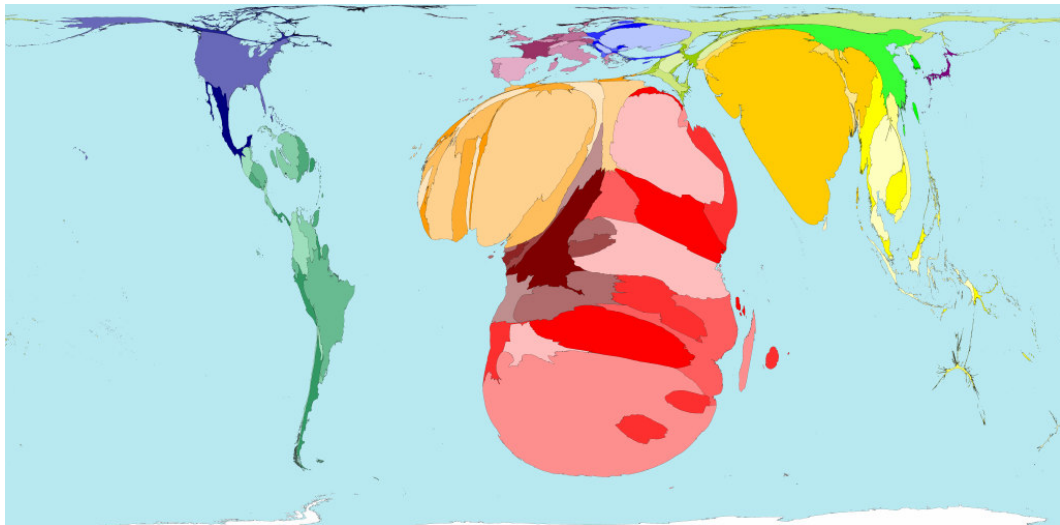


# Graphic Representation of Data Can Really Tell a Story

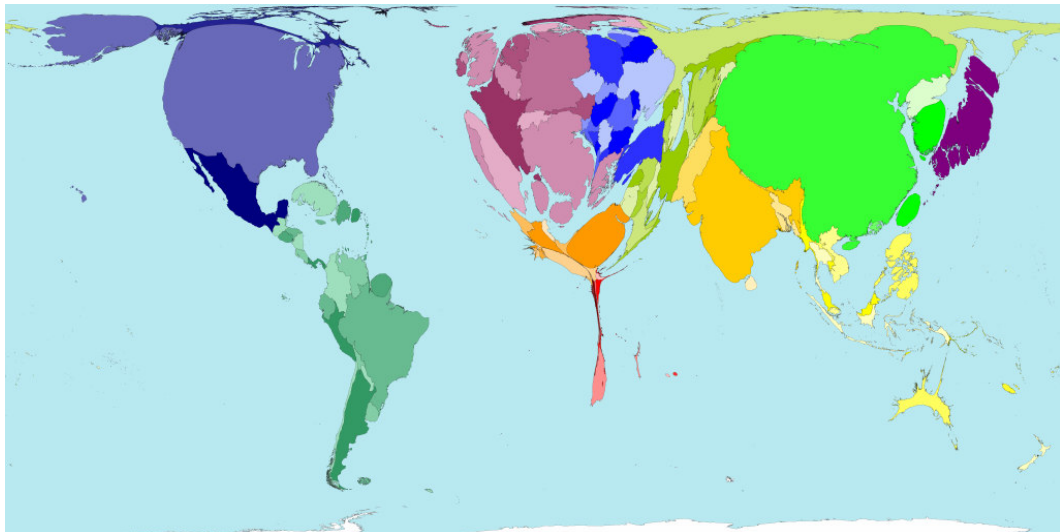
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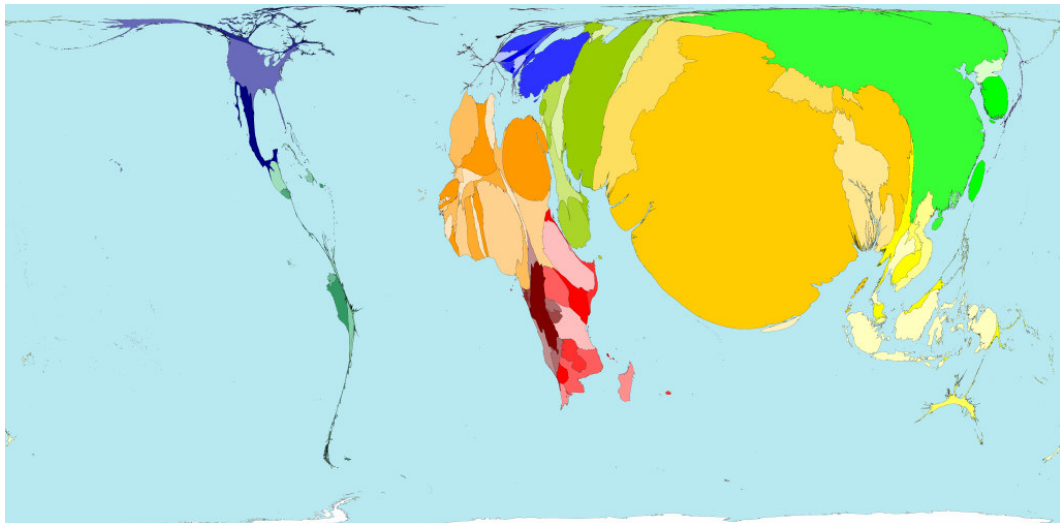
# HIV Prevalance



## Physicians Working



## Illiterate Women



"... illiteracy is essentially a manifestation of social inequality, the unequal distribution of power and resources in society."

Bharati Silawal-Giri, 2003

# Mashup


---

A mashup is a Web site or application that combines content from more than one source into an integrated experience.



# Healthy City Presentation of Data from Multiple Sources

The screenshot shows the 'View Data & Charts' interface of the Healthy City website. At the top, there is a navigation bar with links for 'HOME', 'FIND A SERVICE', 'MY NEIGHBORHOOD', 'COMMUNITY PROFILE', 'DATA & CHARTS', 'HELP / TOOL KIT', and 'OTHER LINKS'. The 'DATA & CHARTS' link is highlighted and marked as 'Updated!'. A 'Keyword Search' box is located in the top right corner. Below the navigation bar, the main content area is titled 'View Data & Charts' and features a 'Step 1 - Select community characteristics' section. This section contains a list of categories, each with an icon and a 'More >' link: Demographic, Housing, Economic / Employment, Transportation, Birth, Prenatal & Child Health, Health Insurance & Health Access, Health Conditions, Physical Activity & Nutrition, Mortality, Neighborhood Characteristics, and Women, Infants & Children (WIC) Data. To the left of this list is a 'User Tool Kit' with links to 'User Manual' and 'Data Guide'. To the right is a 'Help Box' with 'FAQs' and four questions: 'What is the "Data & Charts" room?', 'What is a community characteristic?', 'What type of data is available?', and 'Can I select multiple boxes?'. A 'Submit' button is located at the bottom center of the main content area.



[ABOUT US](#)   [CONTACT US](#)

Keyword Search

HOME
FIND A SERVICE
MY NEIGHBORHOOD
COMMUNITY PROFILE Updated!
DATA & CHARTS Updated!
HELP / TOOL KIT
OTHER LINKS

### Your Community Map

Geography: ZIP Code 90017 [» Change](#)

Characteristic: People in Poverty: Total [» Change](#)

ZOOM IN

0.25 mile

0.5 mile

1 mile

2 miles

5 miles

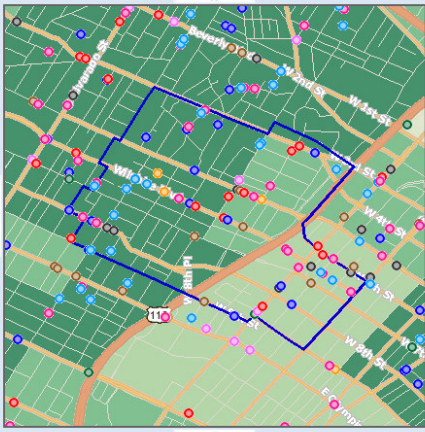
10 miles

25 miles

50 miles

ZOOM OUT

MAP SIZE



**Community Resources**

- Basic Needs
- Consumer Services
- Criminal Justice and Legal Services
- Education
- Environmental Quality
- Health Care
- Income Security
- Individual and Family Life
- Los Angeles City Resources
- Mental Health Care and Counseling
- Organizational / Community / International Services

List resources in selected area [?](#)

List all resources on map [?](#)

Select resources to map [?](#)

**You Can Click on the Map to:**

Click & drag map to navigate
Zoom in
Zoom out
Where am I? [View Data](#)

**Community Characteristic**

**People in Poverty: Total**

The indicator measures poverty in all age ... [More »](#)


0 ~ 298	
298 ~ 677	
677 ~ 1,172	
1,172 ~ 3,326	

Data Year: 2000


Universe: Population for whom poverty status is determined

Source: Census compiled from the SF1 and SF3 sources

Remove characteristic [?](#)
Change characteristic [?](#)
Advanced Mapping Options [?](#)



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 47 Murray Place Princeton, NJ 08540 USA  
 Tel: 609.924.6936 Fax: 609.924.6993  
 E-mail: mbs@iaa.com Web: www.iaa.com

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COMMUNITY PROFILE
Updated! [DATA & CHARTS](#)
Updated! [HELP / TOOL KIT](#)
OTHER LINKS



### View Data & Charts

**Navigation Box**

- [Start a New Search](#)

**User Tool Kit**

- [User Manual](#)
- [Data Guide](#)

**Characteristics**

- Demographic
- Housing
- Economic / Employment
- Transportation
- Birth, Prenatal & Child Health
- Health Insurance & Health Access
- Health Conditions
- Physical Activity & Nutrition
- Mortality
- Neighborhood
- Women, Infants & Children (WIC) Data

**Population**

**Current Data Year : 2000**

	ZIP Code 90017	City of Los Angeles	Los Angeles County
<b>Total</b> <small>All people, male and female, child and adult, living in a given geographic area.</small>	20,689	3,694,820	9,519,338

**Universe**  
Total population

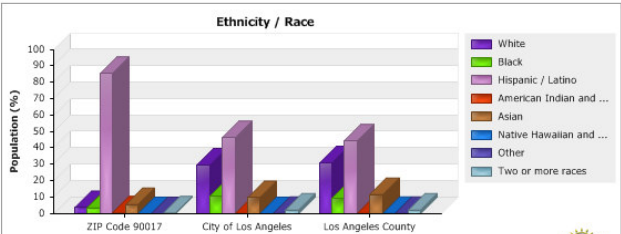
**Source**  
Census compiled from the SF1 and SF3 sources

**Data Year**  
2000

**Ethnicity / Race**

**Current Data Year : 2000**

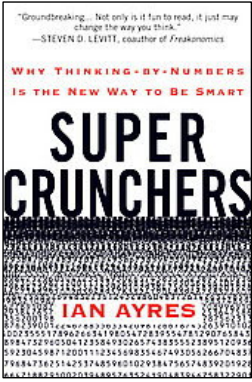
Select Graph Type :   [?](#)



Census compiled from the SF1 and SF3 sources, 2000



# Recommended Reading





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# Time for spirited discussion!