

Let's consider our world not as inherited from our parents but  
as borrowed from our children  
Kenyan proverb

# beldon fund

## 2005 annual report

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## Message from the Chairman, John R. Hunting

The Beldon Fund is in the seventh year of its ten year life span. While I feel I made the right decision to spend out in 10 years ("Sunset" as some would call it), I will save further comments on this decision until we get closer to our final payout.

Right now, however, let me simply state my appreciation for all the good work that keeps Beldon running smoothly – work not only from our dedicated and competent staff, but also work from our equally dedicated and competent Board of Directors.

Like any new organization, we had a few bumps in the road during our early days, but now the board and staff are working as a cohesive – and may I say even caring – community.

I am truly blessed to have this good group collaborating together in making our planet a safer and better place in which to live.

Special kudos, of course, go to our President, Bill Roberts, in pulling together and maintaining such a fine staff, as well as keeping the board fully involved and informed.

Beyond these areas, however, Bill has also been a key figure in the environmental movement, giving freely of his time, energy and wisdom to work with numerous environmental organizations on both the state and national level. Much of this has been done, "Beyond the call of duty" and is appreciated by many within the movement.

As we head towards the last curve of the track, I look forward – under Bill's direction and with the help of our staff and board – to a successful conclusion to our work.

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## Message from the President & Executive Director, William J. Roberts

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The Beldon Fund is at an important juncture in its ten year journey. Past the halfway mark, but well short of the end, we find ourselves in the paradoxical place of gearing up for a final push to protect the environment and, at the same time, helping our grantees prepare for the end of Beldon funding. The exciting grantmaking experiment John Hunting launched in 1999 is about to enter another phase.

Over the last six years, the Beldon Fund has been investing in national and state-based organizations seeking to enhance their effectiveness and "clout" in the policy arena. Our goal is not a quick win or one-time victory, but rather a long term, steady accumulation of power built, simply enough, on the support and activism of average citizens.

This is painstaking, difficult work. It begins with rethinking previous approaches to advocacy, approaches that relied – perhaps too much – on working the "inside". These strategies work fine if those in policymaking positions are friends and allies of environmental protection, but it has proven wholly unsuccessful when anti-environmental ideologues control the levers of power.

Only by sharing information about environmental issues with average citizens – door-to-door, person-to-person, over a long period of time -- can one successfully and consistently offset ideologues on the other side. This means grassroots organizing in places and among constituency groups that environmentalists have generally ignored.

It means talking to Hispanic community activists in Racine, Wisconsin or union members in Green Bay, not just college activists in Madison. It means building deep and lasting partnerships with nurses and other medical professionals, with breast cancer survivors, with parents of children with learning disabilities, and with others to advance the cause of environmental health. And, it means investing in the sometimes unglamorous tools to do this work, from fundraising help to voter file investments to field training programs.

The results of these careful, long-term investments are beginning to pay off. For example, in Wisconsin, environmentalists recently persuaded the state's policymakers to implement aggressive targets for energy efficiency despite stiff industry opposition. This victory came only after two unsuccessful attempts to stop industry-led efforts to weaken Wisconsin's environmental protections. Remarkably, with each setback, the state's environmental community gained strength and support until it finally turned the tide in its favor, relying on a suite of new advocacy tools to do so.

In Michigan, the state's environmental community, which spent most of the last decade trying (and failing) to fend off bad policy changes, brought enough muscle to bear on the state's policymakers to make sweeping changes in the state's water use policies. These changes were made after a unified environmental community contacted more than 200,000 Michiganders about the importance of Great Lakes protection. As in Wisconsin, the environmental community's victory was grounded on a much more sophisticated and aggressive approach to advocacy that made even its strongest adversaries stand up and take notice.

Finally, states as diverse as Maine and Washington have approved bans on a range of toxic substances in the face of fierce chemical industry opposition, thanks largely to newly forged

alliances between environmentalists and organizations representing health affected groups,. These innovative partnerships are poised to bring even larger victories in the months ahead.

Of course, much more needs to be done. But, the important lesson for philanthropists and grantees is that long-term, steady investments in the tools of advocacy, coordination, and relationship-building will pay outsized dividends. Short-term, opportunistic funding will always have its place in environmental philanthropy, but our grantees are showing us the value that long-term, consistent spending can have in helping them become better and more sophisticated advocates.

The Beldon Fund will continue for another few years, but we already see important lessons for our colleagues and grantees. We are committed to documenting these lessons to ensure that the results of this ambitious "experiment" are shared as widely as possible.

In the meantime, we will continue our commitment to capacity-building with an ongoing search for innovative ideas and approaches to help our grantees achieve even more success in the years ahead.

## 2005 Grants List

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### Center for Civic Participation

A grant to Center for Civic Participation for general support activities, including efforts to increase civic engagement by individuals and organizations in the United States.

*Minneapolis, MN* \$100,000 1 Year

### Center for Community Change

A grant to Center for Community Change to support its Community Voting Project to support and strengthen grassroots organizing groups as they integrate civic engagement strategies into their ongoing programs.

*Washington, DC* \$50,000 1 Year

### Clean Water Fund

A general support grant to Clean Water Fund to support its various activities, including efforts to strengthen and expand ongoing grassroots organizing and outreach programs.

*Washington, DC* \$525,000 2 Years

### Common Cause Education Fund

A general support grant to Common Cause Education Fund to promote fairer elections and stronger civic engagement.

*Washington, DC* \$300,000 1 Year

### Common Cause Education Fund

A general support grant to Common Cause Education Fund to promote fairer elections and stronger civic engagement.

*Washington, DC* \$100,000 1 Year

### Common Cause Education Fund

A general support grant to Common Cause Education Fund to promote fairer elections and stronger civic engagement.

*Washington, DC* \$300,000 1 Year

### **Environmental Grantmakers Association**

A project of Rockefeller Family Fund, New York, NY. A grant to Rockefeller Family Fund recommended for its support of the efforts of Environmental Grantmakers Association to promote, diversify, and expand environmental philanthropy.

*New York, NY* \$100,000 4 Years

### **League of Conservation Voters Education Fund**

A general support grant to League of Conservation Voters Education Fund to strengthen state environmental movements and increase the participation of environmental supporters.

*Washington, DC* \$600,000 1 Year

### **Partnership Project**

A general support grant to Partnership Project in support of its various activities, including its Collaborative Environmental Campaign to coordinate the activities of its member groups in defense of environmental protections.

*Washington, DC* \$550,000 1 Year

### **Rockefeller Family Fund**

A general support grant to Rockefeller Family Fund to promote work in environmental advocacy, civic participation, and a variety of other activities.

*New York, NY* \$600,000 1 Year

### **Sierra Club Foundation**

A grant to Sierra Club Foundation to support its Building Environmental Community Campaign.

*San Francisco, CA* \$400,000 2 Years

### **State Environmental Leadership Program**

A general support grant to State Environmental Leadership Program to strengthen the advocacy, organizing, media, fundraising, and operating capacity of state environmental advocacy groups, including those essential to the success of Beldon's Key States program.

*Madison, WI* \$175,000 1 Year

### **Theodore Roosevelt Conservation Partnership**

A general support grant to Theodore Roosevelt Conservation Partnership to amplify the voice of hunters and anglers as advocates for sound environmental policy.

*Washington, DC* \$100,000 1 Year

### **US Action Education Fund**

A general support grant to US Action Education Fund to support its various activities, including efforts to provide information, technical assistance, and leadership development to state, regional, and national organizations.

*Washington, DC* \$300,000 2 Years

### **Washington Environmental Alliance for Voter Education**

A general support grant to Washington Environmental Alliance for Voter Education to support its various civic engagement and capacity building programs.

*Seattle, WA* \$50,000 1 Year

### **Wellstone Action Fund**

A general support grant to Wellstone Action Fund for training and leadership development supporting the organizing and advocacy community.

*St. Paul, MN* \$100,000 2 Years

### **Western Organization of Resource Councils Education Project**

A general support grant to Western Organization of Resource Councils Education Project to support its various activities, including its efforts to strengthen the advocacy, organizing, media, fund raising, and operating capacity of advocacy groups in the Rocky Mountain and Great Plains region.

*Billings, MT* \$75,000 1 Year

## Human Health and the Environment Environmental Justice

### **Alternatives for Community and Environment**

A grant to Alternatives for Community and Environment for its Roxbury Environmental Empowerment Project to develop environmental justice leadership among youth through an environmental justice curriculum, an internship program, and youth-led projects.

*Roxbury, MA* \$100,000 2 Years

### **Asian Pacific Environmental Network**

A grant to Asian Pacific Environmental Network for its Asian Youth Advocates Program to develop the leadership and organizing capacity of young Asian Pacific Islander women in the San Francisco Bay Area.

*Oakland, CA* \$35,000 1 Year

### **Labor Community Strategy Center**

A grant to Labor Community Strategy Center for its National School for Strategic Organizing, which trains over 50 environmental and social justice leaders each year.

*Los Angeles, CA* \$75,000 1 Year

## People Organizing to Demand Environmental and Economic Rights

A project of The Tides Center, San Francisco, CA. A grant to The Tides Center for support of its project People Organizing to Demand Environmental and Economic Rights, which sponsors the Common Roots: Youth Organizer Program, in conjunction with the Chinese Progressive Association, to develop low-income immigrant youth of Chinese and Latino descent in San Francisco's Chinatown and Mission districts into youth leaders and organizers for environmental and economic justice.

*San Francisco, CA* \$35,000 1 Year

## Southern Echo

A general support grant to Southern Echo for its various activities, including its effort to assist groups to enhance the role and capacity of young people to develop policy solutions to environmental problems.

*Jackson, MS* \$75,000 1 Year

## Southwest Network for Environmental and Economic Justice

A project of Community Networking Resources, Albuquerque, NM. A grant to Community Networking Resources recommended for its support of Southwest Network for Environmental and Economic Justice and its Environmental Justice Youth Leadership Development Campaign.

*Albuquerque, NM* \$35,000 1 Year

## Southwest Organizing Project

A project of Southwest Community Resources, Albuquerque, NM. A grant to Southwest Community Resources recommended for its support of the efforts of Southwest Organizing Project to train youth in disenfranchised communities in the Southwest to be environmental justice advocates and leaders.

*Albuquerque, NM* \$50,000 1 Year

## Southwest Public Workers' Union

A project of Centro por la Justicia, San Antonio, TX. A grant to Centro por la Justicia recommended for its support of the efforts of Southwest Public Workers' Union to provide education, advocacy and organizing training, and leadership development to youth in low-income communities in southern Texas.

*San Antonio, TX* \$25,000 1 Year

## Human Exposure to Toxic Chemicals

### Beyond Pesticides/National Coalition Against the Misuse of Pesticides

A grant to Beyond Pesticides/National Coalition Against the Misuse of Pesticides for its Coordinated Grassroots Campaign on Children, Pesticides and Alternatives Project to build a broader and deeper base of support for restricting toxic chemical use.

*Washington, DC* \$50,000 1 Year

### **Center for Health, Environment and Justice**

A grant to Center for Health, Environment and Justice for a 2006 organizing and advocacy conference on the precautionary principle, including state and local follow-up activities.

*Falls Church, VA* \$100,000 1 Year

### **Center for International Environmental Law**

A grant to Center for International Environmental Law for its Creating U.S. Chemical Reform: Building Blocks and Bridges Project to develop a strategy for enacting comprehensive chemical policy reform at the state level.

*Washington, DC* \$75,000 1 Year

### **Center for Progressive Reform**

A general support grant to Center for Progressive Reform to support its various activities, including efforts to ensure that state and federal regulatory agencies can rely upon unbiased and reliable scientific information and advice in implementing health, safety, and environmental laws.

*Edgewater, MD* \$200,000 2 Years

### **Center for Science in the Public Interest**

A grant to Center for Science in the Public Interest for its Integrity in Science Project to expose and prevent the destructive influence of corporate interests on scientific research, publications, and science-based environmental policy.

*Washington, DC* \$100,000 1 Year

### **Citizens' Environmental Coalition**

A grant to Citizens' Environmental Coalition for its Alliance for a Toxic-Free Future, a coalition of New York State organizations working to unite diverse constituencies around the shared need for protection from toxic hazards and the shared goal of precautionary policies.

*Albany, NY* \$15,000 1 Year

### **Citizens' Environmental Coalition**

A grant to Citizens' Environmental Coalition for its Alliance for a Toxic Free Future and its Environmental Health and Justice Caucus, both of which promote state level and New York City toxic-free purchasing policies.

*Albany, NY* \$100,000 1 Year

### **Clean Air Task Force**

A grant to Clean Air Task Force for its Citizen Diesel Emissions Monitoring Project to partner with local groups to engage citizens and health professionals in directly monitoring and publicizing the

exposure of school children, transit riders, and downtown and highway-side communities to toxic soot and smog.

*Boston, MA* \$75,000 1 Year

### **Coming Clean Collaborative**

A project of Kentucky Environmental Foundation, Berea, KY. A grant to Kentucky Environmental Foundation recommended for its support of the efforts of Coming Clean Collaborative to coordinate a multi-tactic campaign against the chemical industry.

*Berea, KY* \$60,000 1 Year

### **Consultative Group on Biological Diversity**

A grant to Consultative Group on Biological Diversity for its Health and Environmental Funders Network to build and strengthen the emerging field of philanthropy at the nexus of health and the environment.

*Washington, DC* \$40,000 2 Years

### **Ecology Center**

A grant to Ecology Center for its leadership and participation in national and Michigan-based campaigns to eliminate persistent bioaccumulative toxins in the health care and chemical industries.

*Ann Arbor, MI* \$60,000 1 Year

### **Environmental Media Services**

A grant to Environmental Media Services for its Science Communication Network to expand the number and disciplines of scientists and medical experts willing and ready to talk with the media on issues of environmental health.

*Washington, DC* \$75,000 1 Year

### **Environmental Defense**

A grant to Environmental Defense for its Health Program to phase out persistent toxic chemicals and develop precautionary chemicals policies.

*New York, NY* \$100,000 1 Year

### **Environmental Health Sciences**

A project of Virginia Organizing Project, Charlottesville, VA. A grant to Virginia Organizing Project recommended for its support of the efforts of Environmental Health Sciences to translate and communicate emerging environmental health research and broaden the base of support for environmental protection.

*Charlottesville, VA* \$100,000 1 Year

### **Environmental Health Strategy Center**

A project of The Tides Center, San Francisco, CA. A grant to The Tides Center for support of its project Environmental Health Strategy Center to phase out persistent toxic chemicals and develop a state-based precautionary chemicals policy.

*Bangor, ME* \$100,000 2 Years

### **Environmental Research Foundation**

A general support grant to Environmental Research Foundation to inform community-based activists, journalists, government officials, health-affected groups, and medical professionals about the relationship between human health and environmental deterioration, and innovative policies to remedy these problems.

*New Brunswick, NJ* \$25,000 1 Year

### **Environmental Working Group**

A grant to Environmental Working Group for its Toxics and Health Program to demonstrate the link between chemical exposure and health using body burden monitoring data.

*Washington, DC* \$200,000 1 Year

### **Focus Project**

A grant to Focus Project for its Working Group on Community Right-to-Know Project to promote public awareness of toxic exposure and health, and work to protect and strengthen state and federal right-to-know policies.

*Washington, DC* \$60,000 1 Year

### **Green Media Toolshed**

A grant to Green Media Toolshed for its Advocacy Strategy for the Age of Connectivity Project.

*Washington, DC* \$43,000 1 Year

### **Institute for Agriculture and Trade Policy**

A grant to Institute for Agriculture and Trade Policy for its Food and Health Program for work towards statewide chemical policy reform.

*Minneapolis, MN* \$75,000 1 Year

### **National Caucus of Environmental Legislators**

A project of Edmund S. Muskie Foundation, Bethesda, MD. A grant to Edmund S. Muskie Foundation recommended for its support of the efforts of National Caucus of Environmental Legislators and its Brominated Flame Retardant Project.

*Bethesda, MD* \$25,000 1 Year

### **Natural Resources Council of Maine**

A grant to Natural Resources Council of Maine for its Reducing Persistent Bioaccumulative Toxic

Chemicals in Maine Project.

*Augusta, ME* \$25,000 1 Year

### **Natural Resources Defense Council**

A grant to Natural Resources Defense Council for its Environmental Health Project to ensure that the science used by government to develop regulations of toxic chemicals is free from manipulation by industry groups.

*New York, NY* \$200,000 1 Year

### **New Jersey Work Environment Council**

A general support grant to New Jersey Work Environment Council for its various activities, including its efforts on chemical security.

*Trenton, NJ* \$25,000 1 Year

### **Ohio Citizen Action Education Fund**

A grant to Ohio Citizen Action Education Fund for its Good Neighbor and Public Education Campaigns to prevent toxic pollution in Ohio and to push for the phaseout of perfluorochemicals.

*Cleveland, OH* \$50,000 1 Year

### **Pesticide Action Network North America**

A grant to Pesticide Action Network North America for its Persistent Pesticides Campaign to collaborate with organizations in Michigan and North Carolina to ban specific high profile compounds and to reduce exposure to all persistent pesticides.

*San Francisco, CA* \$130,000 1 Year

### **Rockefeller Philanthropy Advisors**

A grant to Rockefeller Philanthropy Advisors for its Gulf Coast Ecological Health and Community Renewal Fund.

*New York, NY* \$50,000 1 Year

### **Science and Environmental Health Network**

A grant to Science and Environmental Health Network for its Science Analysis for Environmental Health Project.

*Ames, IA* \$50,000 1 Year

### **Union of Concerned Scientists**

A grant to Union of Concerned Scientists for its Restoring Scientific Integrity Campaign to bring back objectivity, transparency, and nonpartisanship to the process through which scientific knowledge is factored into federal policy decision making.

*Cambridge, MA* \$100,000 1 Year

### **West Harlem Environmental Action**

A grant to West Harlem Environmental Action for its Environmental Health and Justice Caucus of the Alliance for a Toxic Free Future, a coalition of New York State organizations working to unite diverse constituencies around the shared need for protection from toxic hazards and the shared goal of precautionary policies.

*New York, NY* \$15,000 4 Months

## **New Advocates**

### **American Nurses Association**

A project of American Nurses Foundation, Washington, DC. A grant to American Nurses Foundation recommended for support of its project RN No Harm, which is designed to activate nurses as advocates for environmental health.

*Silver Spring, MD* \$150,000 1 Year

### **Breast Cancer Action**

A general support grant to Breast Cancer Action to deploy its membership in national, state, and local efforts to reduce human exposure to toxic chemicals and advocate for greater use of the precautionary principle.

*San Francisco, CA* \$50,000 1 Year

### **Breast Cancer Fund**

A grant to Breast Cancer Fund for its Washington State Program.

*San Francisco, CA* \$35,000 1 Year

### **Californians for Pesticide Reform**

A project of Pesticide Action Network North America, San Francisco, CA. A grant to Pesticide Action Network North America recommended for its support of the efforts of Californians for Pesticide Reform to coordinate a state level environmental advocacy coalition of 175 groups led by new advocacy voices in the health-affected, medical, and parent/teacher communities.

*San Francisco, CA* \$75,000 1 Year

### **Campaign for Safe Cosmetics**

A project of Breast Cancer Fund, San Francisco, CA. A grant to Breast Cancer Fund recommended for support of its project the Campaign for Safe Cosmetics.

*San Francisco, CA* \$300,000 1 Year

### **Center for Children's Health and the Environment**

A project of Mount Sinai School of Medicine, New York, NY. A grant to Mount Sinai School of

Medicine recommended for its support of the efforts of Center for Children's Health and the Environment and its Reduction of Children's Exposures to Toxic Pesticides Project.

*New York, NY* \$75,000 1 Year

### **Commonweal**

A grant to Commonweal for its project the Collaborative on Health and the Environment to inform and engage organizations that represent health-affected people in environmental health advocacy and issue campaigns.

*Bolinas, CA* \$200,000 2 Years

### **Health Care Without Harm**

A grant to Health Care Without Harm for its project to expand the involvement and activism of nurses in environmental health, with a special emphasis on the transformation of chemicals policy.

*Arlington, VA* \$200,000 1 Year

### **Institute for Children's Environmental Health**

A project of The Tides Center, San Francisco, CA. A grant to The Tides Center for support of its project Institute for Children's Environmental Health, which sponsors the Learning and Developmental Disabilities Initiative.

*Freeland, WA* \$50,000 2 Years

### **Massachusetts Breast Cancer Coalition**

A grant to Massachusetts Breast Cancer Coalition for its Massachusetts Precautionary Principle Project, a coalition of Massachusetts organizations working to achieve fundamental reform at the state-level policymaking and regulation on chemical use--stressing prevention of harm to public health and the environment.

*Quincy, MA* \$100,000 1 Year

### **Minnesota Center for Environmental Advocacy**

A grant to Minnesota Center for Environmental Advocacy for its Protecting the Public from Pesticides Project to increase public awareness and involvement, and ensure positive and lasting changes to Minnesota's pesticide policy.

*St. Paul, MN* \$55,000 1 Year

### **Silent Spring Institute**

A general support grant to Silent Spring Institute for its various activities, including efforts to develop tools for science-based advocacy.

*Newton, MA* \$150,000 2 Years

### **Trust for America's Health**

A grant to Trust for America's Health for its Expanding Biomonitoring through Education and Collaboration Project to continue its work advancing the Centers for Disease Control and Prevention and state public health laboratories' biomonitoring programs.

*Washington, DC* \$100,000 1 Year

## Key States

### Center for Civic Participation

A general support grant to Center for Civic Participation to support continued assessment and planning work among advocacy organizations in several states.

*Minneapolis, MN* \$100,000 1 Year

### Center for Public Interest Research

A general support grant to the Center for Public Interest Research for organizing and policy work in the Key States.

*Boston, MA* \$300,000 1 Year

### Clean Water Fund

A general support grant to Clean Water Fund to support its various activities, including its efforts to strengthen and expand ongoing grassroots organizing and outreach programs in Florida and the Upper Midwest.

*Washington, DC* \$400,000 1 Year

## Florida

### Center for Civic Participation

A grant to the Center for Civic Participation for its Save the Voter's Voice Project, a coalition working to educate Floridians about the right to petition their government through the citizen initiative process.

*Minneapolis, MN* \$42,000 1 Year

### Clean Water Network

A project of Natural Resources Defense Council, San Francisco, CA. A grant to Natural Resources Defense Council for the Florida office of its Clean Water Network project to continue advocacy, litigation and media work around water issues in Florida.

*Washington, DC* \$50,000 1 Year

### Florida Association of Community Organizations for Reform Now

A project of American Institute for Social Justice, Washington, DC. A grant to American Institute for Social Justice recommended for its support of the efforts of Florida Association of Community

Organizations for Reform Now to bring together the environmental and labor communities to advocate for effective environmental and human health policies.

<i>Miami, FL</i>	\$200,000	1 Year
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## **Michigan**

### **Michigan Environmental Council**

A grant to Michigan Environmental Council for its Fundraising Capacity Building Project.

<i>Lansing, MI</i>	\$100,000	1 Year
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### **Michigan League of Conservation Voters Education Fund**

A general support grant to Michigan League of Conservation Voters Education Fund to strengthen the capacity of the environmental and conservation movement to mobilize citizens as informed voters and advocates.

<i>Ann Arbor, MI</i>	\$180,000	2 Years
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### **National Wildlife Federation**

A grant to the National Wildlife Federation's Great Lakes Resource Center for its work organizing donors in Michigan, and for its Clean the Rain State Mercury Project.

<i>Ann Arbor, MI</i>	\$75,000	1 Year
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## **Minnesota**

### **Land Stewardship Project**

A grant to support the Land Stewardship Project's Farm and Rural organizing project to build support for environmental protection among rural constituencies in Minnesota.

<i>Minneapolis, MN</i>	\$50,000	1 Year
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### **Minnesota Council of Nonprofits**

A grant to Minnesota Council of Nonprofits for its Minnesota Participation Project to engage diverse constituencies in training, capacity building, organizing, and civic engagement.

<i>St. Paul, MN</i>	\$110,000	2 Years
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### **Minnesota League of Conservation Voters Education Fund**

A general support grant to the Minnesota League of Conservation Voters Education Fund for its ongoing work to educate citizens and organizations on effective participation in government for conservation goals.

<i>St. Paul, MN</i>	\$100,000	2 Years
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## **North Carolina**

### **Conservation Council of North Carolina Foundation**

A general support grant to Conservation Council of North Carolina Foundation to provide advocacy tools and build a stronger network among the state's environmental advocates.

<i>Raleigh, NC</i>	\$50,000	1 Year
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### **North Carolina Conservation Network**

A general support grant to North Carolina Conservation Network for its facilitation and coordination of environmental advocacy efforts in North Carolina.

<i>Raleigh, NC</i>	\$210,000	1 Year
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### **North Carolina Conservation Network**

A grant to North Carolina Conservation Network for its 'Playing to Win' collaborative of six state-level advocacy organizations working to increase the power of the state's environmental community.

<i>Raleigh, NC</i>	\$50,000	1 Year
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### **Pamlico-Tar River Foundation**

A general support grant to Pamlico-Tar River Foundation to support its various programs, including a partnership with Neuse River Foundation to advocate for protecting and cleaning two of the largest watersheds in the state, and for stronger enforcement of current clean water laws in North Carolina.

<i>Washington, NC</i>	\$50,000	1 Year
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## **Wisconsin**

### **Clean Wisconsin**

A general support grant to Clean Wisconsin to continue its advocacy and organizing work to protect Wisconsin's air, water and special places.

<i>Madison, WI</i>	\$150,000	1 Year
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### **Midwest Environmental Advocates**

A general support grant to support Midwest Environmental Advocates' various programs, including its outreach to diverse local groups in key areas of the state, and providing a credible threat of litigation to protect Wisconsin's air, water and land.

<i>Madison, WI</i>	\$100,000	1 Year
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### **Proteus Fund**

A grant to Proteus Fund to support the Wisconsin Blueprint Project to identify opportunities to strengthen the power of the advocacy community in Wisconsin.

*Amherst, MA* \$35,000 1 Year

### **Wisconsin Citizen Action Fund**

A general support grant to Wisconsin Citizen Action Fund to increase and diversify the advocacy capacity of the state's environmental community by leading a diverse and cooperative coalition of groups and mobilizing citizens across issues and constituencies throughout the state.

*Madison, WI* \$150,000 1 Year

### **Wisconsin Conservation Voters Institute**

A general support grant to Wisconsin Conservation Voters Institute for its continued role in strategically convening the environmental advocacy community through the Wisconsin Conservation Power Project, and for its ongoing work to connect conservation-minded citizens with the policy making process.

*Madison, WI* \$200,000 2 Years

### **Wisconsin Conservation Voters Institute**

A general support grant to Wisconsin Conservation Voters Institute for its various activities, including developing a statewide, multi-issue, multi-constituency field organizing plan.

*Madison, WI* \$125,000 1 Year

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### BALANCE SHEET

ASSETS	2005	2004
<b>CURRENTS ASSETS</b>		
Cash and cash equivalents	\$ 266,224	\$ 145,785
Interest receivable	-	140,095
Investments	45,133,193	57,931,841
Rental deposits	37,360	37,360
Other	26,896	36,289
	<u>45,463,673</u>	<u>58,291,370</u>
<b>FIXED ASSETS</b>		
Equipment	144,964	144,964
Furniture and fixtures	99,431	99,431
Leasehold improvements	704,696	704,696
	<u>949,091</u>	<u>949,091</u>
Accumulated depreciation	(693,274)	(606,953)
	255,817	342,138
Total Assets	<u>\$ 45,719,490</u>	<u>\$ 58,633,508</u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>LIABILITIES</b>		
Grants payable		
Current	\$ 2,598,600	\$ 3,451,655
Long-term	50,000	872,000
Accounts payable	48,834	80,422
Payroll related liabilities		-
Federal excise tax		
Current	5,000	-
Deferred	82,131	87,024
	<u>82,131</u>	<u>87,024</u>

Total Liabilities	<u>2,784,565</u>	<u>4,491,101</u>
UNRESTRICTED NET ASSETS	42,934,925	54,142,407
Total Liabilities and Net Assets	<u>\$ 45,719,490</u>	<u>\$ 58,633,508</u>

The accompanying notes to the financial statements are an integral part of these statements.

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## STATEMENT OF ACTIVITIES

	2005	2004
<b>SUPPORT AND REVENUE</b>		
Interest	\$ 619,067	\$ 794,736
Dividends	82,456	315,089
Gain on sale of investments and change in unrealized gain	2,050,588	3,978,938
	<u>2,752,111</u>	<u>5,088,763</u>
<b>TOTAL SUPPORT AND REVENUES</b>	<b>2,752,111</b>	<b>5,088,763</b>

**EXPENSES**

Program		
Grants	11,289,000	13,947,375
Foundation Directed Projects	430,839	471,897
	<u>11,719,839</u>	<u>14,419,272</u>
Administration		
Accounting and audit	27,162	30,013
Bank charges	175	170
Board meeting, conferences and travel	115,613	111,057
Consultants	26,708	61,161
Depreciation	86,321	107,418
Equipment	38,424	30,017
Excise and Unrelated business income taxes	33,138	52,100
Insurance	14,396	14,833
Investment fees	225,156	316,932
Legal	48,814	59,395
Memberships	30,134	26,710
Office supplies	31,792	27,653
Payroll taxes and benefits	346,233	339,496

Rent and utilities	190,624	182,256
Repairs and maintenance	28,319	24,476
Salaries	962,279	893,131
Telephone	33,466	34,877
	<u>2,239,754</u>	<u>2,311,695</u>
Total Expenses	<u>13,959,593</u>	<u>16,730,967</u>
Change in Net Assets for the Year	(11,207,482)	(11,642,204)
Net Assets, Beginning of Year	<u>54,142,407</u>	<u>65,784,611</u>
NET ASSETS, END OF YEAR	<u><u>\$ 42,934,925</u></u>	<u><u>\$ 54,142,407</u></u>

The accompanying notes to the financial statements are an integral part of these statements.

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## STATEMENT OF CASH FLOWS

CASH FLOWS PROVIDED (USED)	2005	2004
<b>CASH FLOWS PROVIDED (USED)</b>		
<b>FROM OPERATING ACTIVITIES</b>		
Change in net assets	\$(11,207,482)	\$(11,642,204)
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation	86,321	107,418
Realized (gain) loss on sale of investments	(2,534,966)	(4,229,347)
Change in unrealized appreciation	484,378	250,409
Decrease in interest receivable	140,095	107,325
(Increase) decrease in other assets	9,393	(8,199)
Increase in accounts payable	(31,588)	(116,902)
Increase (decrease) in grants payable	(1,675,055)	(260,456)
Increase in Tax payable	5,000	-
<b>FROM INVESTING ACTIVITIES</b>		
Purchase of fixed assets	-	(11,962)
Purchase of investments	(18,691,470)	(23,515,986)
Proceeds from sales or maturities of investments	33,535,813	39,228,538
	14,844,343	15,700,590
Net Increase (decrease) in Cash	120,439	(91,366)
Cash, beginning of year	145,785	237,151
Cash, end of year	266,224	145,785

Supplemental Information:

Cash paid for excise taxes

\$ 25,238

\$ 53,900

The accompanying notes to the financial statements are an integral part of these statements.

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## NOTES TO FINANCIAL STATEMENT

### NOTE 1 > ORGANIZATION

The Beldon II Fund (the fund) was established in 1988 as a private foundation organized to distribute monies to public charities involved in environmental preservation.

### NOTE 2 > SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### BASIS OF ACCOUNTING

The Fund's financial statements are presented on the accrual basis of accounting. Revenue is recognized when earned and expenses are recognized when incurred.

#### ACCOUNTING ESTIMATES

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions which affect the reported amounts of assets and liabilities and the disclosure of contingencies, if any, at the date of financial statements and revenue and expenses during the reporting period. Actual results could differ from these estimates.

#### INVESTMENTS

Investments are reported at their value. Fair value is determined using quoted market prices for marketable securities and at the values reported by the Fund for alternative investments. Realized gains and losses on sale are determined by comparison of purchase cost to proceeds. For donated investments, cost is the donor's cost.

#### FIXED ASSETS, DEPRECIATION AND AMORTIZATION

Fixed assets are stated at cost. Depreciation is computed using the straight-line method over the estimated useful life of the assets as follow

Equipment	3-7 years
Furniture and fixtures	7 years
Leasehold improvements	10 years

#### CASH AND CASH EQUIVALENTS

Cash and cash equivalents are checking accounts and operating money market funds.

### NOTE 3 > INVESTMENTS

The Fund's investments consist of the following as of December 31, 2005 and 2004:

	2005		2004	
	COST	FAIR VALUE	COST	FAIR VALUE
Invested cash	\$ (228, 781)	\$ (228, 781)	\$ 1, 025, 646	\$ 1, 025, 646
U.S. government securities	-	-	5,609,133	5,701,274
Corporate bonds	-	-	3,004,590	3,019,702
Common stocks	4,849,524	6,690,986	8,744,503	11,869,939

Assets backed securities	-	-	6,143,236	6,083,766
Bond fund	9,496,862	9,328,515	-	-
Stock fund	169,667	188,024	-	-
Alternative investments	<u>22,632,761</u>	<u>29,154,449</u>	<u>24,702,300</u>	<u>30,231,514</u>
	<u>\$ 36,920,033</u>	<u>\$ 45,133,193</u>	<u>\$ 49,229,408</u>	<u>\$ 57,931,841</u>

The Fund's gain on sale of investments and change in unrealized gain was comprise of the following:

	<u>2005</u>	<u>2004</u>
Realized Gains	\$ 2,534,966	\$ 4,229,347
Change in unrealized appreciation, net of change in deferred Federal excise tax	<u>(484,378)</u>	<u>(250,409)</u>
	<u>2,050,588</u>	<u>3,978,938</u>

NOTE 4> FEDERAL EXCISE TAXES

The Fund's investment income, reduced by certain allowable expenses, is subject to federal excise tax at a rate of either 1% or 2%. The Fund was required to pay excise tax at the 1% rate for 2005 and 2004.

The Fund is also required to make minimum annual charitable distributions within certain time periods. The required distributions is 5% of the average fair market value of investment assets, less the excise tax on investment income. The Fund has satisfied this requiremnt.

Deferred excise taxes are recorded on the unrealized appreciation on investments using the Fund's normal 1% excise tax rate.

NOTE 5> LEASE COMMITMENTS

The Fund is subject to a 10-year lease for office space at 99 Madison Avenue, New York, NY that commenced June 1, 1999. A security deposit of \$33,750 was required under the terms of the lease. Minimum lease payments required by the lease are \$135,000 per year, terminating May 31, 2009.

NOTE 6> RETIREMENT PLAN

the Fund Maintains a defined contribution plan. All full-time, permanent employees are eligible to participate after three months of service. Effective January 1, 2002, the plan was amended to provide improved benefits. Full vesting occurs after two years of service instead of graduated vesting over six years. Each year the Fund contributes 10% of participant's gross salary to the plan. In addition, the fund will match elective contributions by employees up to %5 of salary. Contributions for the years ended December 31, 2005 and 2004 were \$144,338 and \$131,140, respectively.

NOTE 7> LONG TERM GRANTS PAYABLE

The Foundation estimates its long term grant commitments will be paid as follows:

2007 \$50,000

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