

Beldon Fund

2007 Annual Report

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Beldon Fund

2007 Annual Report

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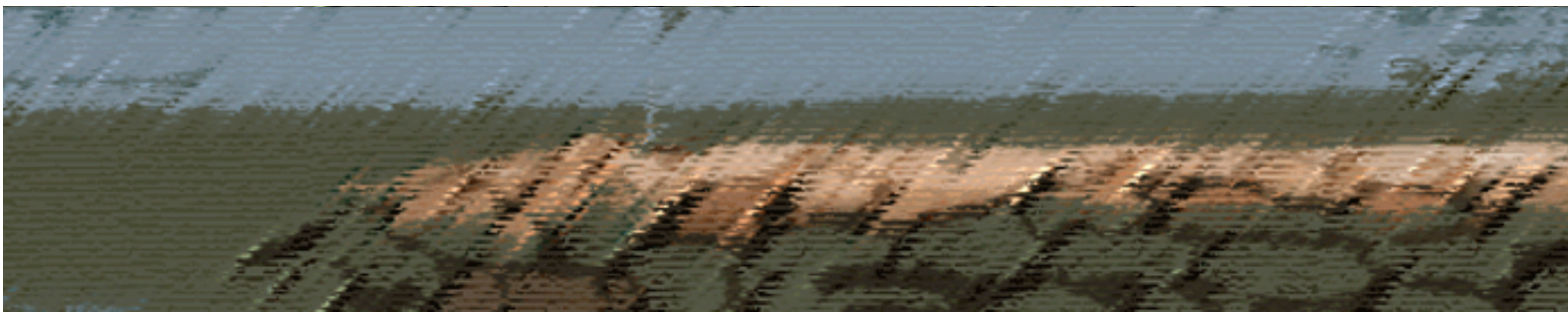
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DISCRETIONARY

Alliance for Justice

A grant to Alliance for Justice for its Nonprofit Advocacy Project and Foundation Advocacy Initiative to advance a proactive agenda to strengthen the ability of nonprofit organizations and foundations to participate in public policy advocacy.

Washington, DC

\$200,000

1 year

Center for Civic Participation

A grant to Center for Civic Participation for its Michigan Voice project, an effort to improve long-term collaboration among nonprofit organizations working to educate and mobilize historically underrepresented voters.

Detroit, MI

\$380,000

1 year

Citizen Action of Wisconsin Education Fund

A general support grant to Citizen Action of Wisconsin Education Fund for its work to increase and diversify the advocacy capacity of the state's environmental community and to provide common tools for use by multiple environmental organizations.

Milwaukee, WI

\$200,000

1 year

Civic Engagement Fund

A grant to the Civic Engagement Fund to provide general support for its overall program to provide training and state-of-the-art tools to organizations committed to nonpartisan civic engagement.

Washington, DC

\$250,000

1 year

Civic Engagement Fund

A grant to the Civic Engagement Fund to provide general support for its overall program to provide training and state-of-the-art tools to organizations committed to nonpartisan civic engagement.

Washington, DC \$125,000 1 year

Clean Water Fund

A project support grant to Clean Water Fund for its Transition Planning and Executive Search Project.

Washington, DC \$137,000 1 year

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 \$700,000 1 year

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

Michigan League of Conservation Voters Education Fund

A grant to Michigan League of Conservation Voters Education Fund for its Donor Development Project.

Ann Arbor, MI \$90,000 1 year

Partnership Project

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

Washington, DC \$550,000 1 year

Project Vote/Voting for America

A general support grant to Project Vote/Voting for America for its ongoing civic engagement activities.

Little Rock, AR \$500,000 1 year

Sierra Club Foundation

A grant to Sierra Club Foundation for its Building Environmental Communities Public Education Campaign.

San Francisco, CA \$400,000 1 year

TakeAction Minnesota Education Fund

A general support grant to TakeAction Minnesota Education Fund to support its ongoing work to build the capacity of Minnesota's nonprofit community.

St. Paul, MN \$60,000 1 year

Tides Foundation

A general support grant to the Tides Foundation to support its overall program, including its funding of environmental advocacy, environmental justice, and civic engagement programs.

San Francisco, CA \$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 \$600,000 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 \$100,000 1 year

Voces de la Frontera - Workers' Center

A general support grant to Voces de la Frontera - Workers' Center for its work to mobilize citizens in Wisconsin around a local environmental agenda.

Milwaukee, WI \$50,000 1 year

Wellstone Action Fund

A general support grant to Wellstone Action Fund for training, leadership development and capacity building supporting the Minnesota nonprofit community.

St. Paul, MN \$657,000 2 years

Wellstone Action Fund

A general support grant to Wellstone Action Fund for training, leadership development and capacity building supporting the Minnesota nonprofit community.

St. Paul, MN \$310,000 1 year

Wisconsin League of Conservation Voters Institute

A project support grant to Wisconsin Conservation Voters Institute for its work with local and state groups in Wisconsin to help organize a collaborative c3 'table' to promote civic engagement and public policy.

Madison, WI \$100,000 1 year

Women's Voices Women Vote

A grant to Women's Voices. Women Vote for its Evaluation Project to assess its 2006 mobilization efforts.

Washington, DC \$100,000 1 year

Women's Voices Women Vote

A general support grant to Women's Voices. Women Vote to support its civic engagement programs.

Washington, DC \$300,000 1 year

HUMAN HEALTH AND THE ENVIRONMENT

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 Stop the Poisoning of Underserved Communities Campaign 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 its BE SAFE Initiative, including the PVC Market Campaign.

Falls Church, VA \$150,000 2 years

Center for International Environmental Law

A grant to the 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 \$150,000 2 years

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 \$100,000 2 years

Clean Water Fund

A grant to Clean Water Fund for its Coalition for a Safe and Healthy Connecticut, an alliance of organizations working to achieve chemical policy reform.

Washington, DC \$150,000 1 year

Coming Clean Collaborative

A project of the 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 \$100,000 2 years

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 \$60,000 2 years

Ecology Center

A general support grant to Ecology Center for its various activities, including leadership of the Michigan Network for Children's Environmental Health.

Ann Arbor, MI \$250,000 1 year

Environmental Defense Fund

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

New York, NY \$150,000 2 years

Environmental Health Fund

A general support grant to Environmental Health Fund for its various activities addressing the public health impacts related to the proliferation of toxic chemicals in the global environment.

Jamaica Plain, MA \$60,000 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, which provides leadership to the Alliance for a Clean and Healthy Maine.

Bangor, ME \$250,000 2 years

Environmental Research Foundation

A general support grant to Environmental Research Foundation.

New Brunswick, NJ \$50,000 2 years

Environmental Working Group

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

Washington, DC \$200,000 1 year

Institute for Agriculture and Trade Policy

A grant to Institute for Agriculture and Trade Policy for its Healthy Legacy Campaign to phase out persistent toxic chemicals.

Minneapolis, MN \$250,000 1 year

Massachusetts Breast Cancer Coalition

A grant to Massachusetts Breast Cancer Coalition for its Alliance for a Healthy Tomorrow, a coalition of Massachusetts organizations working to achieve chemical policy reform.

Quincy, MA \$100,000 1 year

National Caucus of Environmental Legislators

A general support grant to National Caucus of Environmental Legislators to provide policymakers with a forum to share ideas and information on environmental issues and public policy initiatives.

Washington, DC \$60,000 1 year

National Environmental Trust

A grant to National Environmental Trust for its Environmental Health Program to elevate the environmental health debate at the national and state level.

Washington, DC \$100,000 1 year

Natural Resources Council of Maine

A grant to the Natural Resources Council of Maine for its partnership in the Alliance for a Clean and Healthy Maine.

Augusta, ME \$25,000 1 year

Pesticide Action Network North America

A grant to Pesticide Action Network North America for its Healthy Children, Healthy Future: State Partnerships to Reduce Pesticide Hazards Project.

San Francisco, CA \$50,000 1 year

Science and Environmental Health Network

A general support grant to the Science and Environmental Health Network.

Ames, IA \$50,000 1 year

US Public Interest Research Group Education Fund

A general support grant to the Science and Environmental Health Network.

Washington, DC \$175,000 2 years

Washington Toxics Coalition

A grant to Washington Toxics Coalition for its State Alliance for Federal Reform of Chemicals Policy Campaign.

Seattle, WA \$225,000 1 year

New Advocates

Breast Cancer Fund

A grant to Breast Cancer Fund for its Key States and Federal Expansion Program to continue to develop its efforts in Washington State and California, and to expand its presence in other states.

San Francisco, CA \$100,000 2 years

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 \$450,000 2 years

Center for Children's Health and the Environment

A project of Mount Sinai School of Medicine of New York University, New York, NY. A grant to Mount Sinai School of Medicine of New York University recommended for its support of Center for Children's Health and the Environment and its Reduction of Children's Exposure to Toxic Pesticides Project.

New York, NY \$50,000 1 year

Commonweal

A grant to Commonweal for its Collaborative on Health and the Environment Project.

Bolinas, CA \$150,000 2 years

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

KEY STATES

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 \$700,000 1 year

KEY STATES/Florida

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 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.

Miami, FL \$250,000 1 year

KEY STATES/Michigan

Center for Civic Participation

A project support grant to the Center for Civic Participation for its work in Florida and Michigan to support the efforts of state organizations to coordinate nonpartisan civic engagement activities.

Detroit, MI \$150,000 1 year

Michigan Environmental Council

A grant to Michigan Environmental Council to support its Environmental Communications and Community Organizing Initiative (ECCO), a collaborative of nine organizations working to increase the impact of environmental and conservation advocates in Michigan.

Lansing, MI \$150,000 6 months

Michigan Environmental Council

A grant to Michigan Environmental Council to support its Environmental Communications and Community Organizing Initiative (ECCO), a collaborative of nine organizations working to increase the impact of environmental and conservation advocates in Michigan.

Lansing, MI \$800,000 2 years

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.

Ann Arbor, MI \$100,000 1 year

KEY STATES/Minnesota

Conservation Minnesota

A general support grant to Conservation Minnesota for its ongoing work to educate citizens and organizations on effective participation in government for conservation goals.

St. Paul, MN \$50,000 1 year

Minnesota Council of Nonprofits

A grant to Minnesota Council of Nonprofits for its Minnesota Participation Project to build the capacity of local organizations in Minnesota, train local leaders and engage diverse constituencies in issue and other civic engagement campaigns.

St. Paul, MN \$150,000 1 year

Minnesota Environmental Partnership

A general support grant to Minnesota Environmental Partnership to support its efforts to increase support for environmental protection, and for its coordination of the environmental advocacy and organizing efforts of 83 member groups.

St. Paul, MN \$450,000 1 year

Wellstone Action Fund

A general support grant to Wellstone Action Fund for training, leadership development and capacity building supporting the organizing and advocacy community in a number of states.

St. Paul, MN \$450,000 1 year

KEY STATES/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.

Raleigh, NC \$100,000 2 years

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.

Raleigh, NC \$400,000 2 years

KEY STATES/Wisconsin

Citizen Action of Wisconsin Education Fund

A grant to Citizen Action of Wisconsin Education Fund to build and maintain the statewide civic engagement data file for the use of environmental and allied organizations, and for general support.

Milwaukee, WI \$200,000 1 year

Citizen Action of Wisconsin Education Fund

A general support grant to Citizen Action of Wisconsin Education Fund for its work to increase and diversify the advocacy capacity of the state's environmental community and to provide common tools for use by multiple environmental organizations.

Milwaukee, WI \$170,000 1 year

Institute for One Wisconsin

A general support grant to the Institute for One Wisconsin to strengthen the communications capacity of the environmental community and its allies in Wisconsin.

Milwaukee, WI \$275,000 1 year

Public Health Institute

A grant to the Public Health Institute to support its Blue Green Alliance project, a partnership between the Sierra Club and United Steelworkers designed to promote good jobs and a clean environment.

New York, NY \$100,000 1 year

Voces de la Frontera - Workers' Center

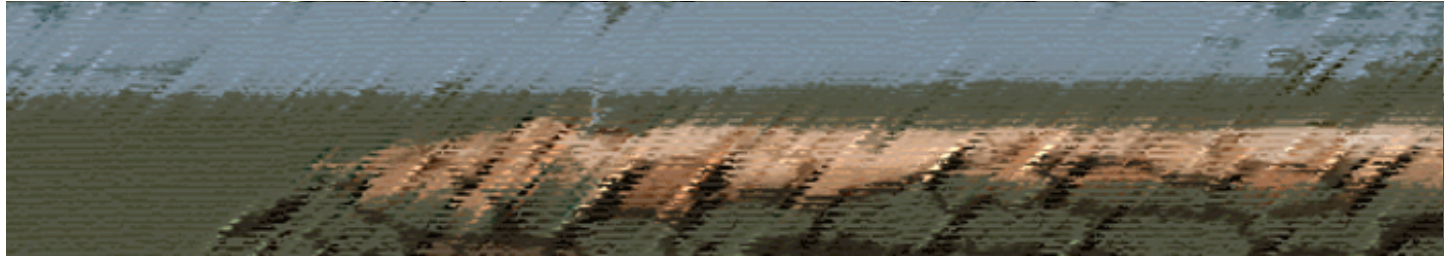
A general support grant to Voces de la Frontera - Workers' Center for its work to mobilize citizens in Wisconsin around a local environmental agenda.

Milwaukee, WI \$60,000 1 year

Wisconsin League of Conservation Voters Institute

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

Madison, WI \$200,000 1 year



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PROGRAM GUIDELINES

The Beldon Fund focuses project and general support grants in two programs: Human Health and the Environment and Key States. These programs are designed to work together to achieve the vision and mission of the Fund. Proposals that work synergistically across programs are encouraged.

HUMAN HEALTH AND THE ENVIRONMENT

For many people there is a distinction between personal health and environmental health. For the Beldon Fund, there is no such distinction. The Fund seeks proposals that engage new constituencies in exposing the connection between toxic chemicals and human health and in promoting public policies that prevent or eliminate environmental risks to people's health, particularly through application of the precautionary principle. The program focuses grant making in three areas: New Advocates, Human Exposure to Toxic Chemicals, and Environmental Justice.

New Advocates: Broaden and strengthen the environmental movement by including new, and potentially powerful, voices for change.

Goal: To encourage new-constituency groups to speak out, become advocates for environmental health and work for lasting improvement in health protections. The Fund will place high priority on the following specific constituencies: doctors, nurses, public health professionals, health-affected people, parents, and teachers.

Work the Fund supports:

- Expanding the capacity of new-constituency organizations, particularly those with a demonstrated commitment to civic engagement, to mobilize public support for environmental health.
- Environmental health campaigns that significantly involve new constituencies.

Human Exposure to Toxic Chemicals: Reveal to the public the connection between toxic chemicals and health so that people understand the importance of taking action now to protect their health and to advocate for change.

Goals: To increase people's awareness and understanding of the connection between environmental toxins and personal health. To strengthen right to know policies and protect the integrity of science. To develop initiatives aimed at reforming chemical policy.

Work the Fund supports:

- Translating new developments in environmental health science (such as body burden data) into accessible tools for advocates, the media, and policy makers.
- Efforts that help environmental advocates strengthen their communication capacity, design effective issue campaign messages, and build environmental health issues into nonpartisan civic engagement activities.

- Specific issue campaigns on chemicals policy reform that channel public concern about chemical exposure and health into policy reform.
- Defense against the undue influence of special interests on scientific research and science-based environmental and health policy.

Environmental Justice: Train young leaders.

Goal: To train a cadre of young leaders from the environmental justice movement in advocacy and civic engagement skills, and to provide them with the tools they need to lead the diverse constituencies engaged in environmental issues that affect human health.

Work the Fund supports:

- Environmental justice advocacy and capacity building through youth organizing and leadership development.
- Fostering participation of low-income communities and communities of color in nonpartisan civic engagement activities.

KEYSTATES

The Beldon Fund believes that states hold the key to bringing about rapid, real change on environmental issues and policy in the United States. By strengthening public support for environmental protection in several states the Fund hopes to transform our nation's approach to environmental protection.

The Fund accepts Letters of Inquiry from Florida, Michigan, Minnesota, North Carolina and Wisconsin for this program. The Beldon Fund believes that the most effective way to ensure consistent policymaker support for environmental protection is to support collaborations of advocacy organizations that focus on building strength and effectiveness at the local, state, and national level.

Goals: Achieve stronger pro-environmental support by national, state, and local policymakers through public education and advocacy in selected states. Help advocates in these states develop adequate resources to replace Beldon's support when the Fund sunsets in 2009.

Approach: Beldon Fund makes grants to organizations that focus on organizing to secure public and policymaker commitment to environmental protection at the local, state and federal level. This means educating the public and mobilizing public support around key environmental issues. In some states, the Fund also makes grants to statewide collaboratives to achieve these objectives.

The Beldon Fund currently supports work in Florida, Michigan, Minnesota, North Carolina and Wisconsin on behalf of:

- Broad coalitions that promote pro-environmental decisions by policy makers.
- Strengthening the advocacy, organizing and media capacity of organizations promoting environmental protection.
- Developing the fund-raising capacity of groups involved in environmental advocacy, including donor development, planned giving, membership development, and major donor fundraising.

These efforts need not be tied to any one particular issue, but should show direct connections to other statewide organizations that seek to build public support for the environment and add clout to the environmental community statewide. We recommend that an organization interested in Beldon Key States funding contact existing Beldon Fund grantee organizations in the state or, if one exists, contact the applicable Beldon

collaborative to begin a dialogue on how the organization's efforts might help build statewide clout. To see if your organization fits within the Beldon Fund's Key States strategies in a particular state and to find the collaborative for that state, click [here](#). Please keep in mind that there are more qualified applications than there is funding available, so even a good fit with our strategies and collaborative efforts are not a guarantee of funding. To see a list of work the Beldon Fund specifically does not offer grants for, click [Exclusions](#). From time to time, the Fund may add and remove states from this program.

EXCLUSIONS

The Beldon Fund does not offer grants for:

- International efforts.
- Academic or university projects, unless they are directly linked to environmental advocacy and have impact well beyond the academic community.
- School- or classroom-based environmental education.
- Acquisition of land.
- Forest, wildlife habitat/refuges, land, marine, river, lake, wilderness preservation, protection or restoration.
- Film, video or radio production.
- Endowments.
- Capital campaigns.
- Deficit reduction.
- Acquisitions for museums or collections.
- Service delivery programs.
- Capital projects.
- Research.
- Arts and/or culture.
- Individuals.
- Scholarships.
- Publications.

GRANT APPLICATION PROCEDURES

Organizations seeking grants from the Fund should begin the process by taking the eligibility quiz on our website, www.beldon.org. If the eligibility quiz suggests that you may be eligible for a grant from the Beldon Fund please submit a letter of inquiry in accordance with our Program Guidelines. The Fund grants both general support and project-specific support for one year or for multiple years. Content requirements and deadlines for letters of inquiry and invited proposals are specified under [Deadlines](#). We require letters of inquiry from all organizations seeking grants from the Fund, including former grantees and current grantees seeking renewal. There is no specific limit on the number of requests we will consider from a single organization, nor is there a limit on the number of years we will continuously fund an organization. The amount granted depends on the scope of the project and the size of the applicant's budget. (To learn more about the kinds of grants we provide, please review the [List of Grants](#) that we have awarded in the past www.beldon.org/beldon/grantees)

The Fund makes grants to public charities classified as tax-exempt under section 501(c)(3) of the Internal Revenue code. If you do not have 501(c)(3) tax-exempt status please indicate the name of the public charity that serves as your fiscal sponsor.

Deadlines

The Fund's staff reviews grant requests and makes recommendations to the Board of Trustees, which makes funding decisions three times a year at its meetings, usually in

winter, spring, and fall. Letters of inquiry and, at the Fund's invitation, proposals must be received in our office within the specified dates to be considered at the next Board meeting. Upcoming deadlines for letters of inquiry and proposals are listed under "Deadlines" in the Grant Applications section of our website. Letters of inquiry and proposals received outside the specified dates will not be considered by the Fund. If a grant is awarded, we will inform you of the Board's decision immediately following the Board meeting at which your proposal is discussed. Requests for funding may be denied at any time.

Preparing Letters of Inquiry

Grant seekers should familiarize themselves with the Fund's Program Guidelines. Proposals are considered in two programs: Human Health and the Environment and Key States. Applicants should consult the Exclusions section of the Program Guidelines to make sure that their type of project is one the Fund supports. If, after reviewing the Program Guidelines and the Exclusions, you wish to apply for a grant, you should submit a letter of inquiry to begin the process.

Please send us two copies of a letter of inquiry of no more than three pages typed in a legible typeface, 12 points in size.

YOUR LETTER MUST INCLUDE THE FOLLOWING INFORMATION:

- Date
- Name and address of organization.
- Executive director and contact person(s); telephone and fax numbers; and, if available, e-mail and web addresses.
- Name, address, telephone number, and executive director of your fiscal sponsor, if applicable.
- A paragraph summarizing the organization's mission and work.
- A paragraph summarizing the purpose of your request and the activities to be supported (indicate whether you seek general or project support, and include the project title, if project funding is requested).
- A paragraph describing the outcomes (goals) to be achieved by your project or organization.
- A paragraph summarizing the proposal's relevance to the Beldon Fund's Program Guidelines, identifying the Beldon Fund program(s) to which your request applies.
- Total dollar amount requested and time period the grant will cover.
- Total dollar amount committed or requested from other funding sources and the names of those sources.
- Total dollar amount of your organizational budget for the current fiscal year.
- Total dollar amount of your actual organizational expenses for the most recently completed fiscal year.
- Total dollar amount of the project budget for the current fiscal year, if applicable.
- The tax-exempt status of your organization or its fiscal sponsor.

Mail two copies of your letter of inquiry to: Letters of Inquiry, Beldon Fund, 99 Madison Avenue, 8th Floor, New York, NY 10016

Please note that your letter of inquiry must be received in our office within the dates specified under "Deadlines" on our website. We do not accept applications electronically or by fax at this time. Please do not submit examples of past work, articles, reports, books, videos, CDs or other supporting materials with your letter of inquiry. Our staff will promptly acknowledge the receipt of your letter of inquiry and give it careful consideration. The Fund's Response to Your Letter of Inquiry

Within one month of the closing date for submission of letters of inquiry, organizations

whose programs or projects fit the Beldon Fund's Program Guidelines will be invited to submit a full proposal with supporting materials. All other applicants will be notified that the Beldon Fund will not be able to support their request.

If you have questions about our Program Guidelines or Grant Application Procedures, or about the status of a letter of inquiry you have submitted, please feel free to contact our Grants Manager, Holeri Faruolo, toll free at (800) 591-9595, or via email at info@beldon.org.

Preparing a Full Proposal

If your organization is invited to submit a full proposal, it need not be elaborate. Your proposal should include a narrative of five-to-seven pages, and supporting material as detailed below. Proposals prepared for other foundations are acceptable as long as they include all of the Beldon Fund's required information and attachments. Also acceptable are the National Network of Grantmakers' Common Grant Application or an application used by another regional association of grant makers.

Please send us two complete copies of the proposal package. The proposal package should consist of the narrative plus financial information and attachments.

YOUR FIVE-TO-SEVEN PAGE NARRATIVE SHOULD BE TYPED IN A LEGIBLE TYPEFACE, 12 POINTS IN SIZE, AND INCLUDE:

- Organization background, including accomplishments and qualifications, particularly as they relate to the purpose for which you are requesting support.
- Immediate problems or needs to be addressed by your project or organization.
- The target population or community served by your project or organization and how that constituency is involved in the design and implementation of your work.
- Long-term systemic or social change being sought.
- Strategies for implementing the work and a timetable for achieving outcomes (goals).
- Plan for evaluating the work (including criteria for success), and for disseminating the findings.
- If appropriate, a plan for continuing the work beyond the grant period.
- If you are applying for renewal funding, submit a brief year-to-date narrative describing your use of the previous year's grant. (We will still expect a final grant report at the end of the year.)

YOUR FINANCIAL INFORMATION SHOULD INCLUDE:

- Organizational budget for the current fiscal year.*
- Actual organizational income and expenses for the past two years.*
- List of your organization's (and, your project's, if applicable) ten largest foundation sources of funding and the dollar amounts committed or pending for the current fiscal year.
- List of your organization's ten largest foundation sources of funding over the last five years and their cumulative grant totals.
- For project grant requests, an annual project budget (for multi-year requests, include an annual budget for each year for which you request funding).
- For project grant requests, a statement of actual project income and expenses for the past two years, if available.

INCLUDE THE FOLLOWING ATTACHMENTS:

- IRS 501(c)(3) determination letter and all IRS rulings or notices regarding the tax-exempt status of your organization.
- If your organization does not have 501(c)(3) status, send the name and IRS

501(c)(3) determination letter of its fiscal sponsor.

- A letter from the fiscal sponsor, if applicable, confirming its Board's authorization to sponsor your project or organization and that your project or organization's purpose is consistent with the fiscal sponsor's exempt purpose, and a letter of agreement between your organization and the fiscal sponsor outlining the terms of this relationship
- Most recent audited financial statements.*
- Most recent IRS Form 990, including any schedules and attachments.*
- Most recent annual report describing your organization's activities, if one is published.*
- If your organization has made a 501(h) election, please include a copy of Form 5768 (Election to Make Expenditures to Influence Legislation).*
- List of member organizations, if applicable.
- List of your organization's Board of Directors and staff (describe Board and staff responsibilities, work and leadership experience, and criteria for board selection).*

* - The Beldon Fund provides grants to public charities. If your organization is not a public charity that has received tax-exempt status under Section 501 (c) (3) of the Internal Revenue Code and intends to operate as a project of another organization, please supply all of the information requested above for that organization. If you have any questions about this issue, please contact our Grants Manager, Holeri Faruolo, toll free at (800) 591-9595, or via e-mail at info@beldon.org.

We encourage you to submit an environmentally sensitive application: avoid folders, plastic covers, or binders and use double-sided copying where possible.

Mail two complete copies of the proposal package to Grant Proposals, Beldon Fund, 99 Madison Avenue, 8th Floor, New York, NY 10016.

(Because proposals require a number of attachments, we do not accept proposals electronically or by fax.) Please note that your proposal must be received in our office within the dates listed under "Deadlines" on our website.

Our staff will promptly acknowledge receipt of your proposal. During our review of your proposal, we may contact you for additional information or material. An invitation to send a proposal and any requests for additional information should not be interpreted as a guarantee of future support. If a grant is awarded, you will be asked to sign a Grant Agreement that describes the reporting and other requirements of the grant.

If you have questions about the status of the proposal you have submitted, or if there are significant changes or news that you would like us to know about during the course of our review, please feel free to contact the program officer who invited your proposal toll free at (800) 591-9595.

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FINANCIAL REPORT
BALANCE SHEET

ASSETS	2007	2006
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CURRENT ASSETS		
Cash and cash equivalents	\$ 505,194	\$ 469,064
Investments	19,599,827	32,625,162
Rental deposits	37,360	37,360
Other	11,412	24,707
	<u>20,153,793</u>	<u>33,156,293</u>
FIXED ASSETS		
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	(846,129)	(774,731)
	<u>102,962</u>	<u>174,360</u>
Total Assets	<u>\$ 20,256,755</u>	<u>\$ 33,330,653</u>
LIABILITIES AND NET ASSETS		
<hr/>		
LIABILITIES		
Grants payable		
Current	\$ 3,735,600	\$ 1,871,600
Long-term	100,000	75,000

Accounts payable	47,365	90,086
Excise and unrelated business income taxes	38,500	38,500
Deferred Federal excise tax	18,480	46,956
Total Liabilities	<u>3,939,945</u>	<u>2,122,142</u>
UNRESTRICTED NET ASSETS	16,316,810	31,208,511
Total Liabilities and Net Assets	<u>\$ 20,256,755</u>	<u>\$ 33,330,653</u>

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

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STATEMENT OF ACTIVITIES

	2007	2006
SUPPORT AND REVENUE		
Interest	\$ 736,929	\$ 854,314
Dividends and partnership earnings	19,406	42,246
Gain on sale of investments and change in unrealized gain	1,486,945	2,314,423
	<hr/>	<hr/>
TOTAL SUPPORT AND REVENUES	<u>2,243,280</u>	<u>3,210,983</u>
EXPENSES		
Program		
Grants	14,628,290	12,364,899
Foundation directed projects	242,037	337,935
	<hr/>	<hr/>
	<u>14,870,327</u>	<u>12,702,834</u>
Administration		
Accounting and audit	21,220	24,630
Bank charges	200	270
Board meetings, conferences and travel	143,019	120,914
Consultants	26,470	18,938
Depreciation	71,398	81,457
Equipment	21,898	17,059
Excise and unrelated business income taxes	50,000	66,300
Insurance	8,653	12,319
Investment fees	25,070	101,730

Legal	60,761	61,545
Memberships	22,045	21,775
Office supplies	21,261	17,703
Payroll taxes and benefits	405,984	381,507
Rent and utilities	197,215	195,307
Repairs and maintenance	29,714	32,518
Salaries	1,130,788	1,047,099
Telephone	28,958	33,492
	<u>2,264,654</u>	<u>2,234,563</u>
Total Expenses	<u>17,134,981</u>	<u>14,937,397</u>
Change in Net Assets for the Year	(14,891,701)	(11,726,414)
Net Assets, beginning of year	<u>31,208,511</u>	<u>42,934,925</u>
NET ASSETS, END OF YEAR	<u><u>\$ 16,316,810</u></u>	<u><u>\$ 31,208,511</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)**2007****2006****CASH FLOWS PROVIDED (USED)****FROM OPERATING ACTIVITIES**

Change in net assets	\$(14,891,701)	\$(11,726,414)
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation	71,398	81,457
Realized (gain) loss on sale of investments	(4,306,020)	(5,796,838)
Change in unrealized appreciation	2,819,075	3,482,415
Decrease in other assets	13,295	2,189
Increase (Decrease) in accounts payable	(42,721)	41,252
Increase (Decrease) in grants payable	1,889,000	(702,000)
Increase excise and un-related business income taxes payable	-	33,500
	<u>(14,447,674)</u>	<u>(14,584,439)</u>

FROM INVESTING ACTIVITIES

Purchase of investments	(316,516)	(15,595,968)
Proceeds from sales or maturities of investments	<u>14,800,320</u>	<u>30,383,247</u>
	14,483,804	14,787,279
Net Increase in Cash	36,130	202,840

Cash, beginning of year	<u>469,064</u>	<u>266,224</u>
Cash, end of year	<u>505,194</u>	<u>469,064</u>

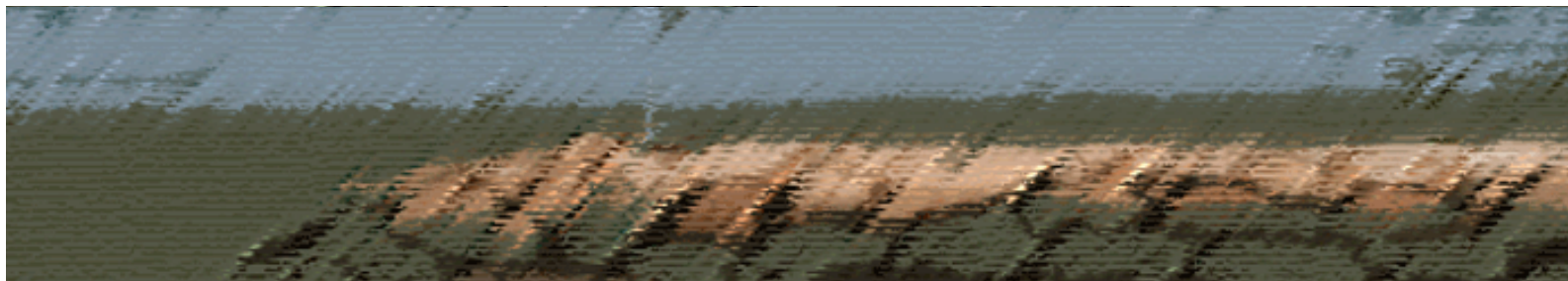
Supplemental Information:

Cash paid for excise taxes and unrelated business income taxes	<u>\$ 50,000</u>	<u>\$ 32,800</u>
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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. In accordance with the donor's wishes, the Fund will spend out its assets and close during 2009.

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 fair value. Fair value is determined using quoted market prices for marketable securities and at the values reported by the Funds for alternative investments. Some of the values reported for alternative investments are based on unaudited numbers. Also, the fair value of these investments can be based on significant estimates made by the fund managers. Actual values could differ. Management believes it will not have to adjust these values. Realized gains and losses on sale are determined by comparison of purchase cost to proceeds. For donated investments, cost is the donor's cost. Invested cash includes receivables and payables for pending trades.

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 follows:

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

All Fixed assets will be fully depreciated by May 2009.

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, 2007 and 2006:

	<u>2007</u>		<u>2006</u>	
	<u>COST</u>	<u>FAIR VALUE</u>	<u>COST</u>	<u>FAIR VALUE</u>
Invested cash	\$ 14,493,916	\$ 14,493,916	\$ 16,130,527	\$ 16,130,527
Common stocks	-	-	715,247	840,455
Stock fund	-	-	158,867	204,164
Alternative investments	<u>3,257,892</u>	<u>5,105,911</u>	<u>10,924,950</u>	<u>15,450,015</u>
	<u>\$ 17,751,807</u>	<u>\$ 19,599,826</u>	<u>\$ 27,929,591</u>	<u>\$ 32,625,161</u>

The invested cash at December 31, 2007 includes \$3,791,566 of alternative investment proceeds in transit from the manager.

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

	<u>2007</u>	<u>2006</u>
Realized Gains	\$ 4,306,020	\$ 5,796,838
Change in unrealized appreciation, net of change in deferred Federal excise tax	<u>(2,819,075)</u>	<u>(3,482,415)</u>
	<u>1,486,945</u>	<u>2,314,423</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 2007 and 2006. One of the Fund's alternative investments also generated unrelated business income taxes in 2006.

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

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 participants' 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, 2007 and 2006 were \$143,268 and \$151,038, respectively.

NOTE 7> LONG TERM GRANTS PAYABLE

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

2009	\$100,000
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NOTE 8> FUND CLOSING

The Fund will close its office during 2009. During 2008 and 2009 the Fund will incur certain expenses with respect to this closing including employee termination costs. A liability has not been recorded for these costs as the cost are conditioned on the employees remaining until their services are no longer required.

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