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# The Beldon Fund: Final Impact Assessment

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## Introduction

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During its time-limited lifespan, the Beldon Fund sought to maximize its impact with focused investments in environmental advocacy and health. The Fund pursued three unique but interrelated strategies to advance positive change on the issues it cared about: 1) Build capacity and clout, 2) Support civic engagement, 3) Broaden the base of support. A fourth strategy, Giving more than grants, supplemented the three main strategies.

To pursue these strategies, the Beldon Fund developed two program areas through which it made long-term grants: 1) the Key States Program, which invested in building long-term sustainable infrastructure, capacity, and tools in a limited number of 'key' states, and 2) the Human Health and the Environment Program, which invested in building the field of environmental health at the state and national levels. The Fund supplemented these two grantmaking program areas with a discretionary fund so that it could support cross-program advocacy tools and activities and be opportunistic when appropriate. Learn more about Beldon's programs and grantmaking strategies [here](#).

As the Beldon Fund was making its last grants in 2008, it commissioned a final independent evaluation (conducted by Keiki Kehoe and Dan Cramer, also the authors of this report), which was presented to its staff and board. That evaluation provided an in-depth analysis of Beldon's overall impact. It also included a compilation of lessons and takeaways for other funders considering a spend-out strategy. Read the full Final Evaluation Report [here](#).

Key to Beldon's theory of change was the idea of building capacity that would continue beyond its lifespan. The conclusion of the Final Evaluation Report noted the difficulty of accurately assessing the 'sustainability' of Beldon's impact and the capacity it has built without the benefit of the passage of time. Given the importance of sustainability to the Beldon Fund, the board and staff made a commitment to take another look at the impact of the foundation five years after it closed. This report provides that final impact assessment.

The fundamental question at the heart of this assessment is: What do we know now that we could not have known five years ago about the impact and legacy of the Beldon Fund? This assessment is meant to complement the more comprehensive Final Evaluation Report written in 2008, with a particular focus on the question of sustained impact. The specific learning objectives for this final impact assessment include:

- Providing the Beldon Fund board and staff with a final analysis of the impact of its work
- Providing other philanthropic entities with a final set of lessons and observations about effective grantmaking and spend-out strategies

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## Assessment Approach

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### Methodology

To explore these learning objectives, 43 in-depth interviews were conducted with a mix of national and state leaders including former Beldon staff, grantees, colleague funders, and observers of the work. Interviewees were determined by several former Beldon staff and advisors, in collaboration with Grassroots Solutions and Keiki Kehoe. They represent a cross section of Beldon stakeholders who worked closely with or were impacted by Beldon. The interview list was determined with an eye toward ensuring that grantees in all program areas and key states were represented, with an emphasis on the Key States Program and the Human Health and the Environment Program. The interview list also included the most relevant colleague funders, Beldon staff, and observers of the work. The majority of interviews were conducted one-on-one by phone, although some took place in-person or in a small group.

### Report Format

Beldon Fund leadership requested that the impact assessment be made as accessible as possible to allow others to easily understand and learn from it. To that end, the assessment has been designed around three “lists” that together aim to answer the overarching question of what we know now that could not have been known five years ago when Beldon ceased operating and the final evaluation was conducted. The lists are as follows:

- **Beldon’s Legacy:** Five years later, what is still in place, or how have investments evolved?
- **Beldon’s Challenges:** Five years later, what can we see that sheds light on the challenges Beldon faced and the efforts that fell short?
- **Beldon’s Lessons for Other Funders:** Five years later, which elements of Beldon’s work offer the most relevant lessons for other funders?

In this report, the items on the first two lists (legacies and challenges) include a brief synopsis of Beldon’s work in different areas with a focus on the relevance of that work today. Three brief “snapshots” of work that reflect Beldon’s legacy are also included. The final list of funder-specific lessons and observations are shorter, high-level lessons that could be beneficial to a wide range of funders.

This report is not necessarily meant to be read linearly. Each of the lists (and each finding within the lists) is meant to stand alone. Therefore, some points may be repeated in several parts of the report if they are relevant in multiple places. The items on the lists reflect consistent feedback from the interviews and analysis of the materials reviewed. The items are supplemented by direct quotations from respondents that illustrate commonly held views.

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## Executive Summary of Beldon's Legacy

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Beldon's overarching legacy is that of a bold funder that planted "seeds" that are still bearing fruit today. Another way of conceptualizing this overall legacy is that they were an "early adopter," advocate, and catalyst of many strategies and tools that today are seen as best practices in the fields of civic engagement, advocacy, and environmental health.

Beldon's living legacy and influence can be seen in the strong 501(c)(3) tables in many states across the country. It can also be seen in the continued work and progress of the environmental health community, a field that Beldon helped bring to life. These are just two highlights of the following list of 11 legacies of the Beldon Fund. Collectively, these are areas where five years later, the Beldon Fund has had a continuing impact and Beldon's investments are either still flourishing or have evolved in a relevant manner.

1. Beldon's efforts to marry policy, organizing, advocacy, and nonpartisan civic engagement work in the environmental community are widely perceived to have been successful; the melding of policy advocacy with civic engagement remains particularly relevant today.
2. As a national funder, Beldon helped pioneer an approach of investing heavily in state-based work, a practice that has become more common today.
3. Beldon prioritized collaboration and the need for strong collaborative infrastructures; in many states, these collaborative efforts remain robust, although they have evolved in different ways both within and beyond the environmental community.
4. Beldon encouraged the use of tools, technology, metrics, and evaluation in ways that were new to many grantees at the time but now represent a best practice in the nonpartisan civic engagement field.
5. Beldon helped shape the field of environmental health, leading to significant shifts in public awareness, corporate behavior, and governmental policies.
6. The infrastructure connecting environmental health advocates remains strong, despite Beldon's exit and the absence of increased funding.
7. Health professionals and health-affected organizations continue to bring powerful voices to a range of environmental campaigns, building on work that was seeded by Beldon more than a decade ago.
8. Beldon's influence on philanthropy continues today and can be seen in the culture, strategies, and collaborations among funders, particularly environmental grantmakers.
9. Beldon's funding and leadership support significantly strengthened League of Conservation Voters Education Fund's affiliates in Michigan, Minnesota, North Carolina, and Wisconsin, helping increase the capacity of the environmental movement in those states in a manner that remains impactful today.
10. By creating a roadmap for spend-out foundations, Beldon's work has informed and advanced the field for a growing number of donors.
11. Core Beldon staff (and others in the 'Beldon family') represent a living Beldon legacy, as they continue to champion many of Beldon's theories of change and they remain active leaders in the field of environmental philanthropy.

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## Beldon's Legacy

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The following is a list of 11 legacies of the Beldon Fund. Collectively these are areas where Beldon has had a continuing impact, and Beldon's investments are either still flourishing or have evolved in a relevant manner.

**I. Beldon's efforts to marry policy, organizing, advocacy, and nonpartisan civic engagement work in the environmental community are widely perceived to have been successful; the melding of policy advocacy with civic engagement remains particularly relevant today.**

Fundamental to Beldon's theory of change was the idea that connecting and marrying policy development, grassroots organizing, broader advocacy, and legally permissible nonpartisan civic engagement work would make the environmental community more effective and powerful.

*"One thing they brought into the funding world is they took an integrated approach. They were early adopters of the cycle of nonpartisan organizing and mobilizing around advocacy and then doing it again around elections. They were out front on this."*

The basic idea was that there should be a year-in and year-out approach to the work that was cyclical in nature. Under this integrated theory, issue advocacy work leads into nonpartisan election work, which then transitions back to issue work, with an eye towards base, capacity, and power building throughout. While the Beldon Fund was not the only organization or leader to advance this approach, it is widely seen as one of the first, if not the first, to do it as a funder in a significant manner.

*"I always describe it as groundbreaking when it comes to civic engagement and combining policy, and organizing, and multi-issue work. That was rare and new to the larger philanthropic world."*

The Beldon Fund invested heavily in this integrated approach by making multi-year, general support capacity-building grants to its key state grantees, as well as to select national grantees. These grants were not project or issue specific, but were flexible so that grantees could work on building and expanding their base and their capacity in ways that could be leveraged for both issue advocacy and nonpartisan voter engagement work. These bigger, multi-year grants are seen today as having allowed organizations to experiment with what it meant to truly marry policy, organizing, and advocacy in a seamless manner.

In addition to investing in this integrated approach, Beldon provided tremendous thought leadership on the subject, which is seen as a particularly valuable part of the Beldon legacy. One specific element of this is that Beldon's evangelizing for the integrated approach increased the comfort level of many organizations with using 501(c)(3) resources for legally permissible civic engagement work as a part of their environmental advocacy efforts. Several interviewees stressed that having a funder actively fund and encourage them to do this work, while also providing grantees access to a top notch lawyer well versed in what 501(c)(3) organizations could legally do, substantially increased their comfort level pursuing civic engagement work.

*"There was no more important funder in terms of encouraging and evangelizing...pushing the limits of what 501(c)(3) dollars can do and really maximizing 501(c)(3)dollars."*

Beldon provided additional thought leadership on the importance of an integrated approach to environmental policy change and capacity-building through speaking at conferences, building relationships with colleague funders, convening grantees, and funding heavily in this arena. The grantee convenings hosted by Beldon are a legacy that continues to have relevance today, long after the events themselves ended. These convenings were a safe place where people could really learn about this approach and meet other like-minded organizations that they could connect with and learn from. Many grantees reported that the convenings helped them see that they were not alone in the challenges they were facing or the change they were trying to achieve in the world. The knowledge gained and shared and the relationships built are still bearing fruit today, with a number of grantees remaining in contact and serving as a network of support for one another.

*“Bringing together leaders to form and cultivate relationships across states and learn from each other. Leadership can be lonely and Beldon helped us find a peer group in the state and outside of it.”*

Beldon’s theory on the importance of integrating policy, organizing, advocacy, and civic engagement, while perceived as forward thinking when the Fund was operating, is far more commonplace in the field today. A more integrated approach has become a best practice in relation to advocacy and base-building not just in the environmental community (where the growth of League of Conservation Voters Education Fund state affiliates, the work of the Sierra Club Foundation, and a number of climate change organizations and initiatives shine through) but also in the broader allied community. Work around health care advocacy and gun violence prevention are both examples of a more integrated advocacy model. Today, five years after Beldon ceased operations, it is safe to say that the Fund’s efforts to marry advocacy and civic engagement work through its investments and leadership helped expand environmental advocates’ toolboxes for driving effective policy change.

*“Thinking back to 2005-6 how many organizations had no clue ...how they could do what they wanted to do in the 501(c)(3) realm. All of that was supported via access to education and efforts by Beldon.”*

## **2. As a national funder, Beldon helped pioneer an approach of investing heavily in state-based work, a practice that has become more common today.**

Beldon chose to invest significantly in five key states at a time when few national funders were investing in states to advance policy change. Moreover, Beldon approached its state-based investments as laboratories for building long-term capacity and civic engagement infrastructure in the environmental community. In the five states, Beldon experimented by funding collaboration (as well as other strategies) among environmental groups with multi-year grants. The goal was to increase the collective power of the environmental community, create economies of scale, and reduce duplication and inefficiencies through collaboration and coordination. In addition to providing funding, Beldon encouraged collaboration by providing its grantees with access to highly regarded consultants, trainings, and opportunities to learn from one another. Beldon's key states were Florida, Michigan, Minnesota, North Carolina, and Wisconsin. It should be noted that Florida was later dropped from the key states program based on lessons learned from trying to do the work in a state as large as Florida. (See pg. 36 of the [Final Evaluation Report](#) to learn more about Florida.)

Five years later, Beldon's focus on state-based work has become more common in the environmental and broader allied communities. More groups are focusing their efforts on states as a more effective and efficient way to work than pouring resources into national policy-change efforts. For example, the Energy Foundation recently launched a key states program for its environmental work with a particular emphasis on the issue of climate change, and in 2010, the Carnegie Corporation, along with several other philanthropic entities, created a State Infrastructure Fund to focus on state-based nonpartisan voter engagement work.

Several interviewees suggested that Beldon's Key States Program was an influence for both of these new state-focused efforts. An Energy Foundation staff member previously ran a state LCVEF affiliate and is very familiar with the Beldon model and its work. Beldon's final evaluation and the lessons it offered served as an important grounding document for the Energy Foundation as it was entering some of its key states. The Energy Foundation staff has also drawn on insights from former Beldon staff in shaping its program. The Energy Foundation, like the Beldon Fund before it, is focusing on state policy change, and is adding a federal engagement component to make the approach even more comprehensive.

*“So many donors we have talked to have moved to the space Beldon was years ago. There is a growing recognition that you need to pay attention to states.”*

In addition to Beldon's overall focus on states, how Beldon approached its work in states is also noteworthy today. Beldon built relationships with state players by bringing groups together to ask them what it would take to win policy changes in their state. Beldon helped partners on the ground identify what was already in place, as well as what gaps needed to be filled in order to win. Beldon frequently encouraged grantees to “map” their states to identify assets, gaps, and opportunities. These relationships, conversations, and mapping exercises served as the basis for the capacity and power-building work in the states. Then, with the support of Beldon and eventually other funders (sometimes recruited by Beldon), the state-based groups worked collectively to address the gaps that had been identified. This state-specific approach of assessing capacity and working collectively to fill gaps and build collective power is now a best practice, though many acknowledge there is still a long way to go.

One example of this approach in practice today can be seen in Ohio, where a local funder (the Gund Foundation) and national funders (the Energy Foundation and the Hewlett Foundation) have come together with local organizations and other funders on the ground to create an active climate table. These funders also created a spin-off table to focus on engaging businesses and other less traditional

voices. The strategy in Ohio was developed based on a gap analysis similar to the type Beldon encouraged. This is not to imply direct causality, but rather to illustrate that the approach for entering and working in states that Beldon helped model is now being adopted by others when developing state-based strategies. Similar evidence can be found in Michigan, Minnesota, and Illinois, where the Energy Foundation commissioned detailed “targeting” and mapping analyses to help identify opportunities and gaps in the states when it comes to building greater capacity to drive policy change on climate change. In these examples in Ohio, Michigan, Minnesota, and Illinois, the national foundation is entering the state in the same manner that Beldon adopted—working closely with local partners and funders and using data and analysis to drive strategic decision-making and resource allocation.

*“I think that this emphasis on focusing deeply in a handful of nationally important states—I think there is a lot to it. So is this ability to bring players in a state together and ask: ‘what do we want to win and what will it take to do it?’”*

*“What will it take to win is the best conversation to have.”*

Finally, many organizations and funders are finding that investing in state-level advocacy efforts is yielding more success and impact than focusing on the federal level. Gridlock in Congress has stifled the ability to successfully advocate for policy change, making state-based work and state policy wins even more attractive. It is worth noting that the conservative right is now also deeply invested in a state-based approach, further indicating that Beldon’s instincts about state-based work were ahead of the curve. While Beldon had hoped that its work in the states would pave the way for broader federal level policy change (a hope that was not realized with the exception of Beldon’s environmental health work), it also saw the inherent value of the state work. It is the approach to states as laboratories for innovation and as places where meaningful policy change can be realized that is today widely considered an enduring Beldon legacy.

*“We’re seeing right now an emergence of great interest in state activity in part because there is federal gridlock, so we can reap the benefits of state-based infrastructure investment now. We couldn’t have predicted it would be that important.”*

*“There is much more funding interest in state capacity work that Beldon pioneered thanks to John...Beldon played a pivotal role in how the set of donors who were thinking about a set of issues could impact the work in states.”*



### 3. Beldon prioritized collaboration and the need for strong collaborative infrastructures; in many states, these collaborative efforts remain robust, although they have evolved in different ways both within and beyond the environmental community.

Beldon strongly encouraged collaboration among environmental organizations in its key states of Florida, Michigan, Minnesota, North Carolina, and Wisconsin. The Beldon Fund did more than encourage collaboration; it also supported collaborative efforts by investing in concrete collaborative infrastructure to help build greater collective power in the states. Specifically, Beldon invested in building state-based environmental “tables” (coalitions of groups working collectively on environmental policy change) in its key states, as well as providing funding and seed money for other collaborative enterprises such as joint mapping, power analyses, and coordinated list-building efforts (almost all of which grew out of the tables). Rather than funding specific issue campaigns or short-term projects, Beldon provided large multi-year grants with a focus on encouraging long-term power building and putting the infrastructure in place to work together to affect change on a variety of issues that could arise over time.

*“They invested in infrastructure when it needed to be invested in.”*

Five years later, the state-based environmental tables Beldon created are still largely intact or have evolved in meaningful ways. With the exception of Florida, environmental collaboratives in Beldon’s key states still exist in some form and are regarded by many as an important place for coordination and collaboration in the environmental community and as a key way to link with other allied communities. Here is a quick summary of where collaboration is happening today in the environmental community in Michigan, Minnesota, North Carolina, and Wisconsin. (Note: Florida was not included in this analysis because it was dropped as a Beldon key state. See pg. 36 of the [Final Evaluation Report](#) for more information.)

- **Michigan:** Michigan LCVEF facilitates Great Michigan, a common agenda-setting process for each legislative session, in which approximately 35 environmental organizations participate. As a secondary collaboration vehicle, the Michigan Environmental Council convenes a weekly conference call called E-Group to share information and discuss the most recent legislative and administrative happenings. Seven of the largest environmental groups in the state participate regularly in E-Group. Broader collaboration around nonpartisan civic engagement happens at the Michigan Voice table, the State Voices affiliate in Michigan.
- **Minnesota:** The environmental collaborative funded by Beldon, the Minnesota Environmental Partnership, is still intact and serves as the primary space for policy collaboration among environmental groups. Conservation Minnesota, the state LCVEF affiliate, is a secondary collaboration hub for the community. Broader collaboration around nonpartisan civic engagement happens at the Minnesota Voice table, the State Voices affiliate in Minnesota.
- **North Carolina:** The environmental collaborative funded by Beldon, the North Carolina Conservation Network, is still intact and serves as the primary collaboration space for the environmental community. North Carolina LCVF is a secondary collaboration hub for the community. Broader collaboration around nonpartisan civic engagement happens at the Blueprint North Carolina table, the State Voices affiliate in North Carolina.
- **Wisconsin:** As was the case during Beldon’s time, most environmental collaboration is happening through Wisconsin LCVEF, including collaborating on issues and selecting collective priorities for each legislative session. Broader collaboration around nonpartisan civic engagement happens at the Wisconsin Voices table, the State Voices affiliate in Wisconsin.

The important thing to note is that across the states, collaboration around environmental policy is still happening. While the vehicle for collaboration may be different than when Beldon exited (more collaboration happening around organizations than at a formal table in some states) the process of developing shared agendas, dividing “turf” and targets, and talking collectively about building power continues today and is seen as a living legacy of Beldon’s philosophy about the importance of environmental organizations working together.

*“I’ve found that once groups start working together, it clicks for them right away, and they seldom if ever go back. They drink the Kool Aid.”*

When exploring the state of environmental collaboration, it is worth noting that, since Beldon spent out in 2008, and the 2010 elections registered a national anti-environmental swing, the environmental community has been tested. Collaboration has become harder in some instances because of political power dynamics and limited funding. Without Beldon’s funding to incentivize collaboration (and with largely defensive battles in sight), some environmental tables have shrunk, with some groups leaving as they saw fewer opportunities to advance policy change and felt released from what some felt was the “obligation” of collaboration.

*“The collaboration is still going, but not as strong because there are fewer incentives and benefits...there’s not as much we’re all doing together, but there’s much more collaboration than would be happening without Beldon’s initial investment.”*

Even if not all groups are still participating in environmental collaboration today, there is widespread belief that Beldon’s funding built power, infrastructure, and capacity within the environmental community that has helped each of the communities develop a firmer “center” from which they can strategize, plan, coordinate, and in challenging times, regroup as needed.

*“We are in a period of political mess but on environmental stuff we are not losing every single battle—we are winning some and passing some...the core is still intact in terms of the work we did with Beldon.”*

The concept of well-coordinated collaborative efforts to affect policy change that Beldon encouraged and funded has become a reality at many tables today. Tables can function at a variety of levels depending on the issue and level of interest from table members. Examples of typical ways that tables function include: 1) groups simply sharing information, 2) groups coordinating efforts, 3) groups collaborating fully to develop shared plans and determine roles based on who is best suited to take on each piece. This third, and deepest level of collaboration, which was described by some as more of a “dream” during the Beldon days, has become a reality.

One illustration of a robust and integrated collaborative effort can be found in North Carolina, where, in 2012, the North Carolina Conservation Network collaborated with Blueprint North Carolina around legally permissible nonpartisan, 501(c)(3) voter engagement work. The nonpartisan work included developing a shared plan, including goals and a universe of contacts with a control group. Within the universe, one group was charged with nonpartisan voter registration and door knocking, one with nonpartisan education-oriented direct mail, and one with nonpartisan education-focused phone banking. The group doing phone banking also did robo calls to identify people who needed rides to the polls, and the information was given to another group charged with coordinating rides. Interviewees pointed to Beldon’s vision in helping make this level of collaboration possible in North Carolina as well as other states, and many believe that the vision has inspired others to pursue similar collaborations.

*“Now it would be real hard for groups to get a change they think is needed without thinking of how to collaborate and form a cluster here. It has become the way you think about it to move things.”*

Beldon helped develop effective collaborative infrastructure in the environmental community, and towards the end of the Fund’s ten-year period, it began to shift its focus to supporting collaboration in the broader progressive policy and issue community. Today, the table model that Beldon so vocally encouraged has become far more common and has been widely adopted by others including State Voices (an organization designed exclusively to encourage and support collaboration around nonpartisan civic engagement work) and America Votes (an organization that supports collaboration on the 501(c)(4) side). Of course, Beldon never funded or supported America Votes because it is a 501(c)(4) entity. A variety of topic-specific tables have also emerged in many states around issues such as gun violence prevention, economic justice, and women’s equality.

*“The work Beldon did with the environmental table seeded the 501(c)(3) table.”*

*“The idea of tables encouraged by Beldon became a model for how to do collaboration not just on the environment but on other issues.”*

Several funders reported that there is currently more funding for collaboration and general civic engagement capacity and infrastructure than ever before. As evidence of this they point to the fact that there are now entire organizations that exist solely to provide infrastructure to the progressive policy and issue community, such as State Voices and Catalist (a national voter file company).

*“It was Beldon long before there was a State Voices...who really had this concept of tables and bringing people together. Not all of them worked, and some were spectacular failures, but there was a vision there. [It] has been replicated. They were the incubator of the concept. State Voices is an outgrowth of the key states program.”*

Although the perception is that the level of funding for this work has increased overall, individual advocacy organizations may not feel that this is the case, given that some of the funding is going to these new infrastructure and capacity organizations that were in their infancy during Beldon’s time. To continue building power and infrastructure, some advocacy organizations reported becoming more innovative in their grant writing, creating grant proposals for short-term issue campaigns that incorporate opportunities for building infrastructure and long-term power.

*“For us, the Beldon Fund helped our organization get better at packaging our traditional campaigns but embedding long-term outcomes we’re interested in. For example, any grant work we’re doing now, we’re including line items that are focused on list growth.”*

It is now widely recognized in the field that you can’t easily go it alone to achieve big policy wins—it takes collaboration and coordination to win. Many people, including those actively involved in State Voices (see snapshot), in particular, believe that Beldon helped bring about this shift in thinking, given its emphasis on the importance of collaboration to build greater collective power.

## Snapshot: The Emergence of State Voices

Beldon's work in its key states of Florida, Michigan, Minnesota, Wisconsin, and North Carolina focused, to a large degree, on encouraging and developing vehicles and tools for collaboration and coordination within the environmental community. Beldon supported building long-term power by funding environmental tables and tools, thus providing infrastructure to the environmental community that would not be dismantled after a single campaign, but would continue serve them over the long-run.

Over time, Beldon expanded its scope beyond funding collaboration and infrastructure in the environmental community to funding these same types of support and power-building vehicles in the broader progressive policy and issue community. Beldon did this because the linkages between the environment and other progressive issues was becoming increasingly clear as was the need to combine the strength of the environmental community with other issue allies to have a greater chance to advance positive policy solutions. As a part of this expanded funding scope, Beldon was one of the seed funders for State Voices, a group that convenes 501(c)(3) tables to foster collaboration and coordination on a state level in the progressive policy and issue community.

State Voices was in its infancy when Beldon spent out in 2008, and it has now grown to become a critical piece of state-level nonpartisan civic engagement infrastructure. Eleven State Voices civic engagement tables existed at the end of 2007; today, State Voices has expanded into 22 states, convening state tables of 501(c)(3) organizations to collaborate on a number of issues, most notably nonpartisan voter engagement efforts.

In many states, State Voices and its table members have developed joint plans for civic engagement activities and divided responsibilities based on which organizations are best suited to take on the work (an approach Beldon had helped model for environmental tables). The benefit of this coordinated approach is that civic engagement becomes more efficient as the tables help ensure that efforts aren't duplicated and important targets aren't missed. This coordinated approach also allows the participating organizations to achieve a greater level of scale and impact than they could as individual organizations or even as issue-specific collaboratives.

Funders and state-level groups also expressed the view that having State Voices serve as the convener and infrastructure for coordination among state groups has made it easier for national funders to support nonpartisan voter engagement efforts at the state level—they are now able to provide grants to State Voices that can be re-granted to groups at the table charged with executing various aspects of the plan.

The seeds Beldon planted in State Voices' state-level nonpartisan civic engagement tables continue to grow today, and it is expected that State Voices will continue to thrive and grow in the future.

*"...the State Voices tables' civic engagement infrastructure is part of the Beldon legacy that is very powerful, and increasingly so."*

#### **4. Beldon encouraged the use of tools, technology, metrics, and evaluation in ways that were new to many grantees at the time but now represent a best-practice in the nonpartisan civic engagement field.**

Beldon introduced both its grantees and other funders to tools, technology, metrics, and evaluation practices that were just emerging in the 501(c)(3) civic engagement world at the time. Beldon promoted these new tools and practices by providing training to grantees, holding convenings for grantees and funders, presenting at conferences, funding the development of new tools, and encouraging grantees to use these tools and adopt new practices. Beldon also placed a premium on measuring and evaluating progress toward civic engagement and advocacy goals and on modifying strategies and work plans based on the evaluation results.

*“I think Beldon’s emphasis on tools and capacity-building and bringing a rigorous data-driven emphasis has helped both those organizations at the state tables and at a national level. It’s part of our national civic engagement landscape that wasn’t here before.”*

In particular, Beldon was an early and vocal funder and advocate for the use of voter files as a key tool for nonpartisan civic engagement and advocacy work. The use of voter files for 501(c)(3) work was at its infancy in Beldon’s time, and Beldon encouraged their use as a foundation for more effective advocacy and organizing and as a shared data source where collaborating groups could track their nonpartisan voter engagement and broader advocacy activities. The use of voter files for advocacy was an especially vital tool for collaboration, allowing groups to divide up work in a more efficient manner and track their activities and evaluate their success in a transparent database that all groups could review and access. It also allowed for far greater accountability—for individual organizations to measure outcomes against their goals and plans, for collaborative partners to keep each other on track, and for funders interested in understanding the return on their investments.

The use of voter files (and the technology platforms for accessing and sharing files) has, of course, become more sophisticated since Beldon spent out. Many interviewees, though, felt that Beldon’s strong emphasis on using voter files and encouraging organizations to learn how they could be best leveraged for collaboration and measurement helped accelerate development and adoption of voter files.

*“The tools were enormous—the voter file. Beldon was the first to fund this. Those types of tools were huge and I could not imagine not having them now. Our groups could not afford the tools on our own. Beldon made the sharing possible.”*

Beldon not only helped fund new tools such as the voter file, but also helped support environmental advocates’ access and maximize other tools that were also commonly used in other arenas, such as modeling and polling, in a more sophisticated and consistent manner. Polling is, of course, frequently used to assist with message development and to measure progress on an issue or campaign. While polling was commonly used in other arenas, it was inconsistently used by environmental groups because they often did not have the resources. Beldon helped address this gap and further helped increase the sophistication in the way polling was used.

*“Things like the VAN, voter file, models, modeling the kind of tools we have always used...Beldon helped bring them over. People were using polling and focus groups but did not understand how to use them...Beldon helped folks understand these tools better and helped introduce us to other tools.”*

Metrics and evaluation were also very important to Beldon as a way to measure progress, ensure real-time learning, and foster greater accountability. Beldon provided funding for environmental organizations to evaluate their work, and, in other instances, directly commissioned independent evaluators to determine the effectiveness of particular advocacy campaigns, strategies, or tactics. This focus on evaluation and learning from advocacy work in real time was, of course, not invented by the Beldon Fund, but they championed it to such a degree that even today people speak of Beldon's influential and early work to make regular and systematic evaluation a standard practice.

*"It's good to have outside donors to force those kinds of testing and results that make everyone better. At that time, it was pretty new. Now it feels pretty normal. But to be testing and having metrics in field organizing was pretty new."*

*"They were huge early adopters of using data...that was their approach and it became our approach."*

In relation to tools and evaluation, it is interesting that several interviewees reflected that, during Beldon's time, the tools and measurement capabilities couldn't always measure what Beldon was hoping to measure. In that way, many said Beldon was ahead of its time. Since Beldon left the field, the technology and tools have caught up with the metrics and data. The measurement and evaluation of civic engagement efforts is now an essential expectation in the field.

## **5. Beldon helped shape the field of environmental health, leading to significant shifts in public awareness, corporate behavior, and government policies.**

*“Beldon put environmental health on the map.”*

Beldon’s leadership in the field of environmental health is one of its strongest legacies, and the body of work it seeded continues to expand, long after Beldon’s exit. Its decision to focus on the intersection of human health and the environment was driven by two goals: to address the issue of toxics in the environment and to engage the new voices that were needed to strengthen the environmental movement.

*“It’s amazing what Beldon did. They took an issue that was really on the margins. It is now breaking through mainstream America. It’s there in the ‘mommy blogosphere.’ ...the strategy has worked very well.”*

The primary focus of Beldon’s environmental health strategy was aimed at advancing policies to regulate the use of chemicals at the state level, based on the assumption that states would drive federal policy makers to act. Five years ago, progress in states was being made, but there was little evidence that federal policy makers were prepared to address the issue. Today, a significant piece of the political landscape has shifted. In 2013, a bipartisan group of congressional leaders proposed legislation to reform the outdated Toxic Substances Control Act of 1976. Many point to this as a major milestone and an indication that Congress is finally poised to act. Environmental health advocates drew a direct line between this development and Beldon’s early and sustained investments in environmental health, particularly at the state level.

*“Overall the Beldon strategy worked. They were investing to create the preconditions and pressure points to force people to the table for comprehensive chemicals policy reform.”*

While the Beldon Fund is closely associated with this state strategy, it was not the only funder, nor was state policy the only driver of progress. Beldon partnered with several other foundations, most notably the John Merck Fund, whose executive director also served on Beldon’s board. The two foundations pursued complementary funding strategies, which included activating different constituencies and investing in consumer and market campaigns. The interplay between the policy and market campaigns played an important role in the overall effort.

The public may have little awareness of the developments in Congress or even in state legislatures, but recent moves by corporate giants have been prominently featured in mainstream media and reflect a multi-faceted strategy supported by Beldon and partner foundations. Last year, Walmart announced that it would require its suppliers to reduce or eliminate ten chemicals in consumer products. Target Corporation announced that it would monitor its suppliers’ use of certain chemicals and give incentives to those who use safer alternatives. And both Procter & Gamble and Johnson & Johnson are reformulating some of their products to eliminate several toxic chemicals.

These developments are voluntary corporate responses to increased public awareness and pressure from consumers. But those on the front lines of state policy battles point to the critical connection between policy and consumer strategies. As states adopt new laws, companies doing business in those states need to comply with a multiplicity of regulations governing the use of chemicals in consumer products. Many point to Washington state as an example of how action in one small state can ripple throughout an industry. A chemical disclosure law in Washington had implications for the entire supply chain of companies operating in the state, adding pressure on industry giants Target and Walmart to



respond. Stricter regulation of chemicals in the EU adds to the complexity that companies face, since most operate in global markets.

Five years after Beldon's grantmaking ceased, there is clear evidence that its strategy is continuing to have an ongoing positive impact.

*"As we've seen before, wins in one state can encourage other states to adopt their own versions of these policies. And once there is a critical mass of state victories, the federal government starts to take notice and take action. We wouldn't have a federal phaseout of decaBDE flame retardants, or a FDA ban on BPA in baby bottles, without strong precedents from the states."*

*"... state strategy, without a doubt, is a significant driver not only to make progress in certain states, but also in ripening the moment for federal reform. When Beldon was investing early on, it was more of a hypothesis that has now been proven."*

Many interviewees observed that the investments Beldon made five and ten years ago have now brought everyone to the table with the shared goal of overhauling federal policies regulating chemicals. The question now is whether Beldon's former grantees will have sufficient influence to shape the ultimate policy in a way that is acceptable to the constituencies they represent. Since much of the momentum for congressional action has been driven by different state regulations, it is no surprise that lawmakers are considering a policy that preempts the states. The untimely death of Senator Lautenberg, the Senate's leading champion for chemicals policy reform, has led some to observe the Shakespearean elements of the debate. Beldon can take credit for helping to set the stage, but the final act has yet to take place.



## 6. The infrastructure connecting environmental health advocates remains strong, despite Beldon's exit and the absence of increased funding.

With chemicals policy reform as a core focus of its environmental health program, Beldon recognized the importance of building an infrastructure to connect and support the state-based campaigns. In 2005, the Safer States network was formalized, with central staff connecting advocates at the forefront of state policy reform efforts. In each state, the coalitions include an array of constituencies, such as nurses, doctors, parents, cancer survivors, firefighters, public health professionals, and others.

Encouragement and early funding from Beldon made this level of coordination possible. A large final grant to the Safer States network provided financial stability for a period of time, but replacement funding has been difficult to find. Even without increased funding, the network is growing and momentum is continuing. In 2013, state policy leaders were tracking more than 110 bills in 29 states. Funding constraints have forced the network to focus its resources on a smaller number of states where progress is most likely.

*"We continue to win because of the base Beldon helped build."*

This infrastructure makes it possible for groups across the country to coordinate their strategies, learn from each other's setbacks, build on their successes, and share tactics and messaging. Safer States partners with the Safer Chemicals, Healthy Families coalition based in Washington, DC, which is focused on helping to shape federal policy. The DC effort is an outgrowth of Beldon's funding, made possible by one of Beldon's last environmental health grants. This national coalition, which has 450 organizational members and claims to represent 11 million people, works in tandem with the Safer States network, leveraging its collective muscle.

*"Look at the co-sponsors of the Lautenberg [Federal chemicals policy reform] bill... 23 of 28 co-sponsors were from Safer States. That was not an accident."*

Two other Beldon-legacy grantees are key partners in this effort and provide important components of the environmental health infrastructure. The National Caucus of Environmental Legislators (NCEL) helps state legislators advance a wide range of pro-environmental policies. In its early years, generous funding from the Beldon Fund enabled the group to establish itself as a viable organization. During the past five years, NCEL has received support from environmental health funders to convene annual forums on chemicals policy. A recent forum attracted 60 state legislators from 20 states, many of whom were outside the Safer States network. This level of participation is an indication of the salience of chemical policy issues for state legislators. Although these bills attract powerful opposition from the chemical industry, they often pass with bipartisan support.

Complementing the work of these partners is the engagement of the national League of Conservation Voters Education Fund, another key Beldon grantee. The League, with affiliated organizations in more than 30 states, is able to deploy its resources to bolster the support of policy-makers at the national level, and LCVEF is able to work in targeted geographies when additional support is needed.

The infrastructure that connects groups working on chemicals policy reform is a clear legacy of Beldon's work. And the fact that the groups have maintained strong networks in the face of declining funding is evidence that environmental health leaders recognize the value of collaboration. Finally, Beldon's lasting influence can be seen in the integration of nonpartisan civic engagement strategies in environmental health work. Advocates working at the state level have a growing understanding of the power of these tools and tactics.

## **7. Health professionals and health-affected organizations continue to bring powerful voices to a range of environmental campaigns, building on work that was seeded by Beldon more than a decade ago.**

Beldon invested in environmental health both to change policy and to help the larger environmental community more effectively reach people beyond its traditional base. As it surveyed the landscape, Beldon chose to invest deeply in health professionals and in organizations that could speak directly to the health effects of chemicals in the environment. By directly funding organizations led by nurses, breast cancer survivors, and others, Beldon sought to add credibility and political muscle to policy campaigns. Many of the advocates whom Beldon supported continue to be active today, and leaders of state and national coalitions consistently highlight the voices of health constituencies in their policy campaigns.

Evidence of Beldon's ongoing impact can be seen in efforts like the Campaign for Safe Cosmetics, which educates the public and mobilizes consumers to take action. Spearheaded by the Breast Cancer Fund, the campaign has reached mainstream audiences, building awareness about a host of chemicals few people can even pronounce. Among its victories, the Campaign for Safe Cosmetics takes credit for helping to convince Johnson & Johnson to commit to using safer ingredients in the cosmetics it produces and distributes worldwide.

Many observers of Beldon's work point to its signature investment in nurses as both a legacy and a lesson for others. Early on, Beldon recognized the power of nurses as advocates on a local level and power players on federal policy. It invested heavily in the national organization representing nurses, only to discover that internal issues within that organization prevented it from making a meaningful contribution to the effort. This realization disappointed many, and left open the question of whether nurses would disappear from the effort when Beldon's funding ended. Five years later, high-profile organizations of nurses do not figure prominently at the national level, but nurses are still involved as advocates and spokespeople for environmental health campaigns around the country (see snapshot).

As a close colleague and Beldon partner, the John Merck Fund has continued its work to expand the voices of health professionals and health-affected constituencies. Its focus has been on a slightly different set of players, but its work has been directly informed by the Beldon experience. By helping its grantees frame their campaigns around protecting the population from chemical exposure during their first days and months of life, they are working with health professionals who specialize in prenatal and infant care. Advocates report that the leadership of mainstream medical organizations representing obstetricians and reproductive health doctors has actively taken up the cause, becoming advocates for chemicals policy reform on Capitol Hill. For these professionals, reducing human exposure to chemicals is a high priority.

The ultimate evidence of the effectiveness of Beldon's strategy to engage constituencies beyond the environmental base is evident in campaigns outside of the chemicals policy arena. Health professionals are actively recruited to join climate and energy debates and are involved in the growing citizen movement to stop the pollution created by the hydraulic fracturing process. Interviewees emphasized the value of the relationships that were built between environmental advocates and these constituencies during the Beldon years, pointing out that the alliances that were formed are now expanding their focus to other pressing environmental health issues.

### **Snapshot: The Alliance of Nurses for Healthy Environments**

Beldon's strategy to cultivate and support nontraditional voices in its environmental health program included making grants to organizations with name recognition like the American Nurses Association and the Breast Cancer Fund. In the midst of this cluster of groups was a less obvious grantee: the University of Maryland School of Nursing.

The grant supported the work of Dr. Barbara Sattler, an Associate Professor in the School of Nursing and the Director of the Center for Occupational and Environmental Health and Justice. Dr. Sattler was working to integrate environmental health into the curriculum of nursing schools. Given Beldon's focus on advocacy and policy change, the University of Maryland might seem an unlikely grantee, but Sattler's passion aligned well with Beldon's vision. She believed that the next generation of nurses needed to understand the connection between the environment and human health, so that they could be better nurses and more effective advocates for patients, and in their workplaces and communities.

An experienced professional and seasoned activist, Dr. Sattler had worked for years to protect communities from the health effects of pollution. She understood the powerful role that nurses can play in educating others, including policy-makers, and was committed to supporting more nurses as informed advocates and community leaders.

Five years of funding from Beldon enabled Sattler to sustain her work at UMD and incubate an idea for creating an organization to spread the work further. Just as Beldon was making its final grants, the Alliance of Nurses for Healthy Environments (ANHE) was born. Sattler draws a direct line between Beldon's early grants and the work she is doing now. "It was the enabling funding that we got from Beldon that helped us launch." And she credits Beldon with invaluable support, advice, and introductions to other donors, including a key funder that stepped in to support the work after Beldon left.

Today, ANHE is a network of more than 3,000 nurses working to integrate environmental health into nursing education, greening their work places, and speaking out in public policy debates. Its members are an integral part of the state and national coalitions working on chemicals policy reform. It is also working to help coordinate state nurses associations to be more engaged in these efforts. Environmental health campaign leaders describe ANHE members as "worker bees" and consider them a core part of the field operation, underscoring the value they provide to the collective effort.

ANHE may not have a high public profile, but Dr. Sattler's commitment to building a national coalition of nurses advocating for a healthy environment is bearing fruit. Although the organization continues to struggle for funding, its members have expanded their scope and are now raising their voices on energy policies, climate change, hydraulic fracturing, and other front-page issues.

## **8. Beldon's influence on philanthropy continues today and can be seen in the culture, strategies, and collaborations among funders, particularly environmental grantmakers.**

John Hunting was never shy about his funding philosophy. He took every opportunity to encourage others to be bold in their giving. His staff followed suit, playing leadership roles in funder affinity groups, helping to educate newcomers, and convening colleagues in powerful collaborations. Five years later, many of the ideas promoted by the Beldon Fund are woven into the fabric of environmental and civic engagement grantmaking.

Foundations that partnered with Beldon point to a legacy that underscores the value of strong relationships between state and national funders, the importance of investing in infrastructure, and the necessity of thinking intentionally and strategically about building the power of the environmental movement and its allies. As more funders focus their attention on state-based strategies, their work is being informed by the Beldon experience.

*"When I get asked about relationships with national funders, I always point to Beldon. ... They were the model for how a national funder can engage state funders in an authentic way."*

*"It was a real learning that we could make a difference by funding the connective tissue, not just the organizations."*

Beldon's influence also continues in the conversations among program officers and foundation leaders during briefings, retreats, and collective strategy discussions. Hunting pushed other funders to consider politics in their giving strategies by hosting lunches and dinners outside of the confines of official meetings. This tradition continues at funder gatherings, as others have stepped up to serve as hosts.

*"If we are not talking about power when we are talking about the environment, then you are irrelevant. ... the Beldon legacy is very clear."*

The infusion of nonpartisan civic engagement into environmental grantmaking has also expanded noticeably in recent years. The Environmental Grantmakers Association and the Funders Committee on Civic Participation are collaborating more closely, co-sponsoring briefings and coordinating events. Participants in the Climate and Energy Funders Group are also paying increased attention to states, nonpartisan civic engagement, and infrastructure.

Many point to Beldon's role in helping establish environmental health as a field within philanthropy as one of its enduring contributions. The Health and Environment Funders Network (HEFN) grew out of strategy sessions led by Beldon and its colleagues more than a decade ago. Over the past decade that network has grown considerably. Since Beldon's spend out, the amount of giving represented by its members has reportedly tripled. As the ranks of HEFN members have expanded, chemicals policy reform is no longer a central focus. Nevertheless, new funders are bringing new interests and passions to the network, and its changing leadership includes some important new players in philanthropy.

Finally, a growing number of funders are embracing John Hunting's philosophy in interesting new ways. In recent years, some foundations with living donors have begun to adopt legal structures that allow them to be more directly involved in activities that would otherwise be off limits to private foundations. For example, the Brico Fund (see snapshot) is maximizing its flexibility as a donor interested in policy and the power of nonpartisan civic engagement. Other philanthropists are embarking on similar direct strategies, seeking ways to maximize the impact of their resources. These philanthropists may not point to John Hunting as their inspiration, but the actions they are taking could easily have come straight from Hunting's playbook.

### **Snapshot: The Brico Story**

The Brico Fund, was created in 1989 by philanthropist Lynde B. Uihlein, and “aims to secure full participation in society for women and girls, to sustain our natural environment and to promote a just and equitable society, and to support the culture and community organizations that enhance the quality of life in Milwaukee.”

At the same time that Beldon was beginning its Key States Program, Brico shifted away from funding direct-service programs and became increasingly interested in longer-term systemic change efforts. In addition to women’s issues and the environment, the Brico Fund also expanded its focus to include building long-term progressive capacity and organizational leadership. This shift for Brico was prompted by the realization that funding individual organizations was not producing the systemic impact it had hoped to see, and by Brico’s belief that funding coordination and collective action would produce greater systemic impact and policy change in Wisconsin.

As Beldon was entering Wisconsin through its Key States Program, it connected with the Brico Fund. As was its practice, Beldon was looking for potential in-state funding partners and colleagues. The two organizations quickly realized that they had similar ambitions for Wisconsin and that they thought about advancing change in similar ways. They became close collaborators, with a shared vision of building long-term power for collective impact and policy change in Wisconsin. Brico became Beldon’s trusted colleague and state-based funding partner. Beldon served as a national partner to Brico, offering a national perspective and lessons and insights from its work in its other key states. Ultimately, the Beldon Fund and the Brico Fund (in cooperation with several other funders) partnered in developing and funding the Wisconsin Blueprint Project, an overarching 10-year plan for building nonpartisan civic engagement infrastructure in Wisconsin.

To be more flexible and less constrained by formal processes and restrictions on giving, Brico ultimately shifted its legal structure from a foundation to a limited liability corporation. This change allowed it to be nimble, make decisions quickly, and pursue more political work than was permissible when it was a foundation. This is a strong example of a colleague funder to Beldon that fully embodied Beldon’s philosophy of maximizing 501(c)(3) resources. Brico understood how 501(c)(3) work and more advocacy-oriented work can be integrated in a legally permissible way to have a bigger impact and effect change.

Since the Beldon Fund spent out, the Brico Fund continues to follow the model that it and Beldon developed together and to serve as a significant funder of civic engagement infrastructure in Wisconsin. The Brico Fund remains a strong funder and partner to Wisconsin Voices, the State Voices affiliate, and has been a strong advocate in Wisconsin for coordination and collective action as the best way to achieve policy change. Of all the funders Beldon partnered with, Brico was identified as one of Beldon’s closest collaborators.

**9. Beldon’s funding and leadership support significantly strengthened League of Conservation Voters Education Fund affiliates in Michigan, Minnesota, North Carolina, and Wisconsin, helping increase the capacity of the environmental movement in those states in a manner that remains impactful today.**

Beldon invested heavily in the League of Conservation Voters Education Fund at both the national and state level. In four of Beldon’s five key states (Michigan, Minnesota, North Carolina, and Wisconsin) the Fund’s support played a vital role in strengthening and growing state LCVEF affiliates. Furthermore, Beldon’s engagement in the national and state leagues helped support a culture shift in those institutions, which has led to greater synergy and integration between state and national entities. During Beldon’s years, the state leagues were linked together by the Federation of State Conservation Voter Leagues, which operated in tandem with the national LCVEF. Today, the Federation has merged with the national league and its coordination and capacity-building functions have been significantly elevated within the national organization.

The growth of the state leagues in the key states, which are among the strongest in the country, is an important Beldon legacy. These organizations have remained strong and have continued to increase their capacity to advance environmental policy change since Beldon left the field. In each of these states, Beldon also invested in other environmental organizations and collaborative vehicles, many of which also remain integral to the environmental movement today. Because of the significance of the state leagues in Beldon’s strategy, this assessment looked at these organizations at three points in time: 2002, during early Beldon support; 2008, as Beldon closed; and today. This review shows an impressive trajectory of growth and increased capacity. Although Beldon only provided funding for 501(c)(3) organizations, information about 501(c)(4) budgets are included in this assessment because it provides a useful overall picture of the organization’s strength and development over time. The affiliate’s staff growth, supporter growth, fundraising growth, and other relevant measures of capacity and strength were also included in this assessment.

In Michigan, the LCVEF state affiliate has grown considerably since Beldon’s early investments. This can be seen in the growth of its operating budget in both its 501(c)(3) and 501(c)(4) operations (see table below). Leaders of the Michigan League of Conservation Voters Education Fund noted that Beldon helped it grow from a nascent organization that had gone through four executive directors in five years to a thriving organizing by investing in fundraising expertise and staffing, board development, and the development of effective advocacy campaigns, with core messaging as a fundamental component. With Beldon funding and support, Michigan LCVEF built a strong board and established the first collaborative email action alert system to support its work on a common agenda, which has evolved to become one of the most sophisticated communications systems in the state. Since Beldon left the field, Michigan LCVEF has increased its capacity to effect change by growing from 6.5 staff members in 2009 to approximately 16 staff members in 2014. In addition, a number of candidates endorsed by environmentalists have gone on to win elections; 33 of 48 candidates endorsed since 2008 have been elected.

| Michigan LCVEF         | Budget in first year of Beldon funding (2004) | Budget in last year of Beldon funding (2008) | Budget today (2014) |
|------------------------|---|--|---------------------|
| 501(c)(3)              | \$150,000                                     | \$341,000                                    | \$784,000           |
| 501(c)(4) <sup>1</sup> | \$109,500                                     | \$256,000                                    | \$601,340           |

<sup>1</sup> The Beldon Fund at no time funded 501(c)(4) activities.



In Minnesota, the state LCVEF affiliate is called Conservation Minnesota and has grown considerably from when Beldon first invested in it in 2002 (see table below). A key leader of Conservation Minnesota noted that Beldon helped provide a stable source of support during a time when the organization was establishing itself. This was an entrepreneurial phase when the affiliate was testing different strategies. These tests ultimately led the organization to create a strategic framework that enabled Conservation Minnesota to grow its support base and influence. From 2011 to today, Conservation Minnesota has increased its capacity considerably, growing its staff from 6 to 11, growing its donors from 198 to 1058, increasing its activists from 1,300 to 42,000, and growing its Facebook support from 840 to 15,500. Most importantly, Conservation Minnesota has increased its advocacy influence in legislative districts in Minnesota. In 2011, Conservation Minnesota had less than 2% of legislative districts with 100+ members; today, they have 100+ members in 70% of legislative districts. Conservation Minnesota was also a lead partner in the successful effort in 2008 to pass a constitutional amendment that provided dedicated funding for environmental and conservation initiatives.

| Minnesota LCVEF        | Budget in first year of Beldon funding (2002) | Budget in last year of Beldon funding (2008) | Budget today (2013-2014) |
|------------------------|---|--|--------------------------|
| 501(c)(3)              | \$67,500                                      | \$743,000                                    | \$1,100,000              |
| 501(c)(4) <sup>2</sup> | \$62,500                                      | \$327,000                                    | \$ 217,000               |

In North Carolina, the state affiliate has also experienced growth (see table below). It is worth noting that in 2014, a large, unexpected gift increased both its 501(c)(3) and 501(c)(4) budgets. This large gift can be seen as an indication of the confidence the donor has in the North Carolina affiliate to deliver results. Leaders of the North Carolina League of Conservation Voters Foundation reported that Beldon helped it grow by providing year-long training around infrastructure, fundraising, and communications as well as providing consistent support so that they could focus on building the organization. The leaders also credit Beldon with pushing them to collaborate and think strategically. Although the environmental community in North Carolina doesn't always play "nicely" together, interviewees suggested that the collaborative conversations and structures Beldon supported helped push members of the community to figure out how to work together.

| North Carolina LCVF    | Budget in first year of Beldon funding (2003) | Budget in last year of Beldon funding (2008) | Budget today (2014) |
|------------------------|---|--|---------------------|
| 501(c)(3)              | \$208,950                                     | \$361,800                                    | \$1,617,370         |
| 501(c)(4) <sup>3</sup> | \$ 96,000                                     | \$265,151                                    | \$ 663,698          |

Since Beldon left the field, North Carolina LCVF has recruited new, powerful board members. It has also expanded staff capacity over the past five years, which has increased its media outreach significantly, and it plans to expand staff capacity even more in the coming year. In addition, the 501(c)(4) and PAC raised \$176,000 in 2012 for electoral programming, besting its previous record of \$111,000 in 2006. This meant that, besides labor and legal organizations, the North Carolina League of Conservation Voters was one of the top investors in the America Votes table in North Carolina.

Beldon is also a part of the success story of the Wisconsin League of Conservation Voters Education Fund. This can be seen in the growth of its operating budget in both its 501(c)(3), 501(c)(4) and PAC (see table below). Although the current 501(c)(3) budget is smaller than before the Beldon spend out, the budget is substantially larger than when Beldon first started funding the Wisconsin affiliate. State leaders said that Beldon helped the Wisconsin affiliate grow by helping it build a successful statewide

<sup>2</sup> The Beldon Fund at no time funded 501(c)(4) activities.

<sup>3</sup> The Beldon Fund at no time funded 501(c)(4) activities.

field-organizing program, diversifying its fundraising base through its training to build fundraising capacity, and helping it convene the environmental community to set shared legislative priorities. Leaders specifically point to Beldon’s support in helping pass the Great Lakes Compact, reauthorize the Stewardship Fund, and pass the 2006 Clean Energy Act. They further note that Beldon’s funding helped strengthen the Wisconsin LCVEF affiliate by raising the profile and power of the environmental community to the level of other progressive issues, such as labor and choice.

| Wisconsin LCVEF              | Budget in first year of Beldon funding (2002) | Budget in last year of Beldon funding (2008) | Budget today (2014) |
|------------------------------|---|--|---------------------|
| 501(c)(3)                    | \$100,000                                     | \$505,000                                    | \$395,000           |
| 501(c)(4) & PAC <sup>4</sup> | \$ 80,400                                     | \$311,818                                    | \$588,061           |

Since Beldon left the field, Wisconsin LCVEF increased its base considerably. Facebook support grew from 690 in 2010 to 15,560 in 2013, and its email database increased from 3,938 in 2008 to 17,437 in 2013. Board fundraising rose from \$26,478 in 2008 to \$123,160 in 2012, and online donations increased from \$23,888 in 2010 to \$109,608 in 2013. A further sign of Wisconsin LCVEF’s increasingly powerful base is seen in the growth of top-level activist leaders, which increased from 15 in 2008, to 2,556 in 2013. Facing the shift in power in Wisconsin over the past few years, several observed that the League’s power has meant the environment has not been a target in the same way other progressive issues have been in Wisconsin under Governor Walker.

*“If it had not been for Beldon the [Wisconsin] League would not have been strong, and the environment [would] not be on the radar when it came to elections. No environmental groups were at the table with unions and choice groups. Because of that our issues were 3rd and 4th tier. Now we are at the table and one of the bigger [nonpartisan civic engagement] players, and because of that legislators care about what we think and that is a key thing that would not have been here but for Beldon.”*

The Michigan, Minnesota, North Carolina, and Wisconsin League of Conservation Voters Education Fund’s state affiliates are all stronger and more powerful than they were 11 years ago when Beldon began funding many of them. Beldon’s investments helped make these state affiliates become more attractive to other donors, increasing confidence in the affiliates’ abilities to use significant resources in effective ways. More broadly, the state leagues represent a key element of both the environmental and progressive community infrastructure. In many ways, they serve as living legacies of Beldon’s theory and approach of investing in long-term state-based capacity to advance environmental issues.

*“A huge piece of infrastructure they [Beldon] built was LCV...the fact that LCV is a feared and respected organization is really thanks to Beldon.”*

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<sup>4</sup> The Beldon Fund at no time funded 501(c)(4) activities.



## **10. By creating a roadmap for spend-out foundations, Beldon's work has informed and advanced the field for a growing number of donors.**

*“One of the things that is powerful about the nonprofit sector is that we learn from what’s gone before. We have sedimentation of experience—our own fossil fuel of civil society advancement. Beldon did a huge service in being out there very early.”*

When John Hunting implored his fellow philanthropists to spend out their assets he spoke with a fierce passion reflecting his deep commitment to save the planet before it was too late. What he could not know at the time was that he was on the leading edge of a wave that would sweep the philanthropic sector.

According to research published in *Philanthropy* magazine, fifty years ago only five percent of the total assets of the largest 50 foundations were held by spend outs, but by 2010, nearly a quarter of the assets were held by spend outs. This trend reflects the changing nature of philanthropy and the growing role of foundations headed by living donors. Many of these donors want to maximize the impact of their resources in their lifetimes and are choosing to spend out their assets to achieve specific goals.

The Beldon Fund was not only ahead of its time, it laid the groundwork for others who have come since. Beldon's strategy for spending out was carefully designed to leave a body of work from which others could learn. The foundation documented its programmatic and administrative decisions, distilled lessons from its experiences, and made everything public by posting it on its website and keeping the website up as a resource after the Fund closed. Former staff and board members wrote articles, conducted interviews, traveled the philanthropic circuit, participated in spend-out working groups, and talked with colleagues who were curious or considering similar paths.

Interviews with the heads of other spend-out foundations reflect the value of Beldon's contribution to their work. For some, the fact that Beldon “went first” helped increase the comfort level of the work they faced.

*“They were hugely helpful and influential. The fact that John talked about it publicly made it much easier for me to do the same thing. It was a big scary endeavor when you have grantees depending on you. It made a huge difference.”*

*“It made our board feel more confident that there is a template, that it has been done.”*

The philanthropic sector has many consultants, lawyers and financial advisors, but foundation executives found that these advisors lacked experience with spend outs and were not focused on the kinds of issues they faced. For them, the documentation of Beldon's experience was extremely valuable.

*“We're looking very closely at Beldon's experience not on the program side but more on how we communicate, what kind of planning we do for staff, those more administrative things.”*

*“I was just thrilled to find not only the printed materials, but that they were actually able to give me the nuts and bolts spreadsheet. ... What to look at five quarters out and severances packages. ... The nuts and bolts were a lifesaver. No one had produced that. The lawyers were busy telling me about other things. This was not in their sights.”*

And many were keenly interested in Beldon's experience preparing grantees for its departure. Beldon's early and clear communications with its grantees were seen as a model, as was its focus on capacity-

building in the final years. Inspired by Beldon, some tried to emulate its efforts to build the capacity of grantees, with mixed results.

*“We had difficulty getting grantees to understand the reality. Some didn’t want infrastructure support or technical assistance, or to do capacity-building. They were angry and in denial. ... You can be telling them for five years, and they don’t get it.”*

*“[Beldon’s] capacity-building ... was very influential to us. We did a similar thing with our grantees in last four years. ... We had a small stable of consultants to help with fundraising and management issues. ... We left our grantees strengthened.”*

Beldon’s decision to invest staff time and other foundation resources in telling its story was an act of generosity toward the sector. Those who are spending out on the heels of Beldon have clearly learned from its experience and taken relevant pieces back to their own foundations. Time will tell how enduring Beldon’s impact will be, but five years out it appears to be strong.

## **11. Core Beldon staff (and others in the ‘Beldon family’) represent a living Beldon legacy, as they continue to champion many of Beldon’s theories of change and remain active leaders in environmental philanthropy.**

People were the core of Beldon’s strategy, and Beldon focused on investing in both leaders and leadership development. This emphasis on people actually started with the Beldon staff itself as the Beldon Fund devoted considerable energy to hiring and retaining experienced and well-respected staff, who could serve as effective advocates for its mission and theory of change. This emphasis was important because Beldon did not just see itself as a funder, but also as a partner, strategist, convener, and mentor to its grantees, and, in some instances, to colleague funders. Beldon focused on leveraging its expertise and relationships in all of these areas to have maximum impact on the field in its short lifespan. Even though Beldon has closed its doors, core Beldon staff members, as well as others in the ‘Beldon family,’ continue to impact the field in a positive way and to spread Beldon’s influence and ideas to others.

Three former Beldon staff members in particular—Bill Roberts, Antha Williams, and Anita Nager—remain influential in the field today: Bill Roberts was Beldon’s President and Executive Director from 1998 to 2008, and now serves as a Principal at Corridor Partners. At Corridor Partners, he advises donors interested in investing in advocacy and elections to build bipartisan support for addressing climate change and energy policy, and he infuses these efforts with research and evaluation to ensure their success. Antha Williams was a Program Officer at the Beldon Fund, and is now the Environment Program Lead at Bloomberg Philanthropies, where her work focuses on “driving strong, measurable, and local action on climate change.” Rather than focusing on climate change policy on the national or international level, Bloomberg Philanthropies focuses on encouraging cities to take action on climate change. Anita Nager was the Director of Programs at the Beldon Fund, and its final Executive Director (2009). Now, Anita is a consultant and continues to advise foundations and individual donors on environmental giving with a special emphasis on environmental health philanthropy, strategy development and assessment, and spending out.

For Bill, Antha, and Anita, their new roles allow them to continue to spread Beldon’s ideas and focus on areas such as measurement and evaluation, affecting change at the local level, spend out strategies, and the intersections of environmental policy, advocacy, and civic engagement. These three staff members all continue to lead and influence the field of environmental philanthropy, and Beldon’s theories and ideas continue to live in the work they are doing today.

Beldon’s living legacy extends beyond the individuals who made up its core staff. Throughout its lifespan, Beldon invested in leaders and leadership development as a way to strengthen the field and sustain its theory and approach. Grantees were challenged to think differently about their work, and to have conversations with their peers about what it means to build real power. When former grantees spoke of Beldon’s impact, many pointed to friends, colleagues, and organizational leaders who grew and changed as a result of Beldon’s investments. Some of these leaders continue to head organizations that Beldon supported a decade earlier, and many others have moved into important and influential positions in the larger community. Beldon “alumni” can be found in foundations, government offices, legislatures, and in a full range of nonprofit advocacy organizations. All carry the thread of Beldon’s vision and the skills and experience they gained while they were connected through grants, trainings, peer-to-peer gatherings, and collaborations inspired and supported by Beldon.

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## Beldon's Challenges

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Beldon's efforts were not without challenges and part of its legacy includes those aspects of its work that did not go as well as its board and staff hoped. Interviewees were pressed to reflect on areas where Beldon's efforts fell short. Three central challenges shed light on the areas where Beldon struggled.

### I. Making change in a 10-year time frame

When Beldon embarked on its spend-out path it sought to have a much bigger impact than would have been possible with a more traditional foundation model. The additional resources allowed the Fund to have a big vision, and the short time frame put pressure on staff and grantees to act with a heightened sense of focus and urgency. Beldon staff and consultants pushed hard to realize their vision, at times going beyond a level of engagement grantees typically expect of foundations. Looking back, some observed that Beldon had unrealistic expectations about what could be accomplished in the time allowed, and at times acted in ways that were detrimental to some grantees.

While many grantees embraced the sense of urgency implicit in Beldon's spend-out strategy, some perceived a level of impatience and forcefulness that was not entirely welcome. Beldon's compressed time frame put added pressure on grantees to make significant organizational changes or be left behind. In some cases, groups with complementary missions were encouraged to merge. The mergers did not happen and the relationships between some of the groups were strained as a result. In another case, Beldon's interest in ensuring that an organization had strong leadership led to a hasty executive transition; poor decisions were made and the organization suffered a significant setback in its work.

Another unintended consequence was the downstream impact of the winnowing of Beldon's grantee pool. Over the course of its grantmaking, Beldon refined its priorities and made difficult decisions about letting go of grantees. In some cases, such with Florida, letting go meant giving up an entire geographic region. But in other cases, it meant leaving behind a subset of groups within a geographic area or a program area. Although this was a thoughtful process, some felt that it sent a signal to other funders that was damaging to the organizations that were left behind. Some shared the perception that Beldon anointed certain grantees with favored status, and residual tensions between groups continue to this day.

These observations, which were made by some while Beldon was still operating, emerged in this assessment as noteworthy because they continue to persist. Given Beldon's deep commitment to encouraging collaboration, it is striking that five years later some observers continue to point to Beldon's grantmaking as one of the factors that has made collaboration more difficult for some groups.

Every foundation makes hard decisions about where to invest, and many impose a set of expectations on grantees that force organizational changes. What made it more challenging in Beldon's case was the compressed time frame. Given what Beldon was trying to accomplish in ten short years, it is not surprising that it ruffled some feathers.

## 2. Preparing grantees for its exit

One of the biggest challenges Beldon faced was preparing grantees for its exit after the infusion of generous multi-year support. Beldon's staff and board devoted considerable resources to this aspect of its work. However, the timing of the spend out could not have been worse. Just as Beldon was closing its doors, the Great Recession was taking an enormous toll on the philanthropic sector, making it extremely difficult for nonprofits to maintain equilibrium. This made Beldon's investments in capacity-building more important than ever.

*"Beldon did one of the best jobs I've seen about being clear about its intention to spend out, the reasons, giving grantees lots of notice and long multi-year off-ramp, a concerted effort to recruit other funders to pick up their work. They really worked hard at it."*

Beldon began preparing grantees for its departure from day one, by clearly communicating that the foundation had a non-negotiable ten-year lifespan. There was widespread agreement that Beldon could not have been clearer and more transparent about its spend-out plans and timeline. Giving substantial notice was important because Beldon was a significant funder for a number of its grantees, and the notice allowed them time to plan for the future when Beldon's funding would no longer be available.

In addition to giving notice, Beldon invested considerable resources in building the fundraising capacity of its Key States grantees through its Fundraising Support Program. This soup-to-nuts program included trainings by high-level experts in organizational branding, communications, small-donor fundraising, and major donor development. Participating groups were brought together for multi-day sessions and provided with one-on-one follow-up consulting by expert practitioners. Participants were overwhelmingly positive about the program when it was underway, and those interviewed for this assessment were still able to articulate the benefits of the experience a full decade later. Many felt better positioned for Beldon's exit because of the fundraising support they received.

*"The bottom line is that it was top-notch assistance [the fundraising training]...and the trainers they brought in were excellent at their craft."*

While the anecdotal results of Beldon's efforts are overwhelmingly positive, the actual return on investment is not easy to measure. All interviewees reported that the program significantly strengthened their fundraising efforts, yet some admitted that their organizations stumbled. Organizational readiness emerged as the most significant obstacle for groups participating in this program. Some simply didn't have the right staff or boards in place to get the most out of the opportunity. Others struggled with untimely staff transitions, which set back their efforts. And even those organizations that appeared well positioned to take advantage of the program said that it took longer for the investments to pay off than they anticipated.

Former Beldon staff echoed these observations when they reflected on the effort. Designing and implementing an effective capacity-building program is only part of the challenge. It is not uncommon for groups to think they are ready for intensive training and coaching, only to realize later that their boards and/or staff were ill equipped for the challenge.

*"It is very labor intensive. It's getting into the guts of the organization, working directly with board members. ... It almost has to be mouth to mouth..."*

Despite Beldon's best efforts, many grantees suffered when Beldon's support ended. The fact that Beldon provided large grants over multiple years meant that groups built out their programs to take

advantage of the resources. And although Beldon structured the final grants in ways that were intended to soften the impact of its departure, many groups were forced to cut programs and lay off staff.

Because of the recession, the years immediately following Beldon's spend-out were some of the most challenging for finding new donors. Some grantees said that Beldon's fundraising support program helped them weather the recession by providing their organizations with a more diverse set of donors and tools for better fundraising planning.

When former grantees were asked what Beldon could have done differently to help their organizations be better positioned for the post-Beldon transition, interviewees expressed nothing but gratitude for what Beldon attempted. For many, the reality was that even the most robust individual donor program could not replace the generous grants they had received from Beldon. The organizations that appear to have fared the best are those that received significant support from new donors, particularly foundations that arrived on the scene as Beldon was exiting.

*"They prepared us very well. They were so clear they were not going to be here. They did so much fundraising training. They did more than any funder could be expected to do."*

### 3. Finding replacement funders

*“One of the hardest things a foundation can do is persuade another foundation to support its grantees.”*

In addition to helping grantees become more effective at raising money from individual donors, Beldon worked hard to cultivate a new set of foundations and large donors to fill the gap when it left. This was made more difficult with the timing of the recession, which prevented many foundations and donors from expanding their grantmaking. Former grantees in Beldon’s key states have benefitted from continued support from state-based funders, and some have experienced an influx of funding from national donors. Since Beldon selected battleground states that were in the national spotlight, it is not surprising that funder interest in these states has continued beyond 2008. But what is surprising to many is that Beldon’s attempts to hand off its environmental health work to other foundations were far less successful.

As it was making its final grants, the prospect of leaving the field with a new set of funders focused on chemicals policy reform seemed fairly certain. Promising new philanthropists were poised to enter the field, and some long-standing supporters appeared ready to increase their commitments. Unfortunately, that did not happen. During the past five years, philanthropic support for Beldon’s environmental health priorities has declined. A number of funders that were expected to step up have either reduced their giving or withdrawn their support altogether. The irony of a declining funding base just at the time that federal policy makers appear ready to act is not lost on the advocates or remaining donors.

*“The lack of replacement money is the single biggest disappointment for me. ... support for environmental health should be growing. The issue was expected to spark a lot of passion and it didn’t.”*

Many who were interviewed for this assessment were perplexed about the lack of sustained funding for Beldon’s environmental health grantees. Candid observations by donors and others attribute this to several factors. Some pointed to the problem of scale, and the challenge of funding a set of very small groups, many of which lacked established institutional structures. Others felt that the conflicting points of view between some of the leaders in the field made it difficult to discern which groups were most effective. And still others pointed to funder fatigue and the difficulty of sustaining (much less increasing) funder interest in policy battles that can take decades to resolve.

Beldon was certainly aware of these challenges and took deliberate steps to address them. It helped grantees knit together coalitions so that the work of many small groups was more connected and coherent. It invested in groups that disagreed with each other and worked hard to help them find common ground. And it served as a tireless cheerleader each time progress was made on the long path to policy reform. Nonetheless, five years later, replacement funders remain elusive.

At the time of this assessment, one of Beldon’s former environmental health funding partners was using the Beldon experience to inform its own strategy for bringing new funders to the table. By analyzing the obstacles preventing other funders from committing to the field after Beldon left, this foundation is developing alternative approaches that may be more promising. It is too early to tell whether these efforts will be successful, but it is a clear example of others building on Beldon’s legacy.

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## Funder Lessons

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A full set of funder lessons was included in the [Final Evaluation Report](#). Many of the funder lessons from that report resurfaced during this assessment. The most frequently cited included: 1) Don't bite off more than you can chew, 2) Invest in leaders who share your vision, 3) Be willing to take risks, and 4) Be diligent in evaluating your impact and be ready pivot if things aren't working.

The following list is a final set of funder-specific lessons and observations that could not have been discerned in 2008, but are apparent five years after Beldon closed its doors.

### **1. Don't equate continuation with success.**

Embedded in the spend-out philosophy is the idea that today's philanthropists should focus on today's problems, mustering all of the resources at their disposal. Foundations lay the groundwork for long-term change and set up a trajectory of work that they hope will continue after they depart. Yet strategies are not static and the landscape of work is continually evolving. Beldon left a rich legacy, as evidenced by the many investments that are still bearing fruit. But many expressed dismay that more funders had not rallied to support the work on chemicals policy reform. Some pointed to this as a failure, despite Beldon's best efforts. While it is certainly true that some of Beldon's former grantees are struggling for funds, the overall field of environmental philanthropy has grown and expanded in ways that could not have been predicted or planned. Like much of Beldon's legacy, the work continues but in different forms.

### **2. Spending out can mean that more than just money is leaving the field; your voice and leadership can also be lost.**

Beldon was seen by many as more than a funder; Beldon was also a partner, a mentor, and an advocate. When Beldon left the field, many anticipated the loss of its funding and mourned the loss of its leadership. Today, it is clear that the loss of such an influential voice may be even harder to replace, creating a leadership gap in the field. Beldon served as a strong advocate for its theory and approach, including its emphasis on collaboration, infrastructure, grassroots organizing, and capacity funding. Although other funders are certainly displaying leadership in this area, there is a sense that no one seems to own the space like Beldon did. Former Beldon staff and the 'Beldon family' have helped to fill this gap, but many former colleagues and grantees wondered if there might have been others ways for Beldon to continue to make its voice and ideas heard, even after it spent out.

### **3. Prepare grantees for your departure, but have realistic expectations.**

Beldon put a tremendous amount of effort into preparing its grantees for life after its last grant. As many have observed, Beldon went above and beyond all expectations, investing direct dollars in capacity-building and large amounts of staff time in outreach to new prospective donors. Beldon's efforts redefined foundation best practices, setting an example for those who have followed. While there is widespread agreement that these efforts were valuable, the sizes of Beldon's grants were such that many grantees were unable to fill the gap after Beldon departed. Despite its best efforts, some groups that Beldon worked hard to support have faltered and disappointed and some funders that Beldon worked hard to enlist as successors have chosen to invest elsewhere. In each case the circumstances are different, but the lesson is the same: not everything is going to work, no matter how hard you try.



#### **4. Plan for the contingency of surplus funds after the foundation closes.**

Planning a spend out requires thoughtful consideration of many contingencies, particularly financial obligations that may arise after grantmaking ceases. As Beldon was closing its doors, it developed a plan to ensure that any surplus funds would be used to further its goals through a final grant to the Tides Foundation. For example, the commitment to conduct this final impact assessment was included as part of that planning. When all of the dust settled, a few years after Beldon closed, the remaining funds were somewhat larger than anticipated. Beldon's grant agreement letter with Tides included a plan for disbursing these funds through two environmental and civic engagement collaborative funds managed by Tides. This ensured that no money was inadvertently left on the table.

#### **5. Live with your bets.**

Like all foundations, Beldon made a series of strategic choices about how and where to invest its resources. Had it been a perpetual foundation, its board and staff might have been more inclined to prolong the decision-making, or to change their minds along the way. But the reality of being a spend out meant that the foundation was racing to the finish line as soon as the starting gun was fired. To be sure, the strategies shifted and priorities evolved, but most of the adjustments reflected a tighter and tighter honing rather than a wholesale rethinking. This seems appropriate.

What emerged in this assessment was an interesting revelation. Five years after spend out and fifteen years after the strategy was crafted, staff and board members alike were wondering whether they had chosen the right path. The nagging question on many of their minds was whether they could have helped tip the scales on federal climate policy had they focused their attention on that issue. This assessment can't answer that question, but it should assure Beldon that it made some solid bets and that its funding and hard work have had an enduring impact that can still be seen today.

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## Conclusion

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When the Beldon Fund embarked on a spend-out strategy, it did so with a bold vision of what it hoped to achieve over the course of ten years. It sought to maximize its impact with focused investments in advocacy and civic engagement infrastructure, and in an expansion of the base through its work on environmental health. In 2008, a comprehensive evaluation provided the Fund's board and staff with an extensive review of its many accomplishments. Because that evaluation was conducted just prior to the Fund's closure, it could describe the trajectory of Beldon's work, but it could not predict what would happen in the future. This final impact assessment provides an inventory of Beldon's legacy, five years after its grantmaking ended. It tells the story of a foundation that brought innovative ideas to its grantees, built capacity and infrastructure, and planted seeds that continue to bear fruit. As a spend-out foundation, it struggled with challenges that other spend outs share, and the lessons learned from this assessment are intended to help others embarking on similar paths.

One of the striking aspects of this assessment was the deep regard that interviewees had for Beldon's founder and staff. Many observed that the very fact that Beldon was willing to ask hard questions five years after its spend out was remarkable. Beldon's desire to embark on an exploration of this nature is a testament to its extraordinary commitment to strengthening the field of environmental advocacy and civic engagement.

*"People looked to Beldon as a landmark in philanthropy. It holds a very important place because of John's vision and boldness and willingness to commit to success and failure. Take risks, and the disappointments, and learn from the latter to inform a new level of success. He had a tremendous impact that will continue to accrue: civic engagement infrastructure, tables, technology, and tools. It is an evolving field, and its success is rooted in those investments from Beldon."*

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## Appendix: Interview List

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Below is a complete list of those interviewed, either by phone or in-person, to develop this assessment report.

Kathy Aterno, *Clean Water Action/Fund*  
Paul Austin, *Conservation Minnesota*  
Allison Barlow, *philanthropic consultant*  
Patricia Bauman, *Bauman Fund, former Beldon board member*  
Mike Belliveau, *Environmental Health Strategies Center*  
Bob Bingaman, *Sierra Club*  
Jeff Blodgett, *Consultant to Alida Messinger*  
Brian Buzby, *NC Conservation Network*  
Denise Cardinal, *Progress Now*  
Carrie Clark, *North Carolina League of Conservation Voters*  
Stuart Clark, *Town Creek Foundation*  
James Clift, *Michigan Environmental Council*  
Stanley Dole, *West Michigan Environmental Action Council*  
Sarah Doll, *SAFER States*  
Carrie Doyle, *Energy Foundation*  
Diane Feeney, *French American Charitable Trust*  
Shelley Hearne, *Forsythia Foundation*  
Ruth Hennig, *John Merck Fund, former Beldon board member*  
Andy Igrejas, *Safer Chemicals, Healthy Families*  
Diane Ives, *The Kendeda Fund*  
Gene Karpinski, *League of Conservation Voters, former Beldon board member*  
Ron Kroese, *McKnight Foundation, formerly with Minnesota Environmental Partnership*  
Cathy Lerza, *philanthropic consultant*  
Jeff Malachowsky, *Wellspring Advisors*  
Dick Mark, *Buttonwood Partnership*  
Steve Morse, *Minnesota Environmental Partnership*  
Anita Nager, *philanthropic consultant, former Beldon staff*  
Mark Redsten, *Clean Wisconsin*  
Bill Roberts, *former Beldon staff*  
Barb Sattler, *Alliance of Nurses for Healthy Environments*  
Kerry Schuman, *Wisconsin League of Conservation Voters*  
Jane Schwartz, *Paul Rapoport Foundation*  
Jon Scott, *Clean Water Action, Singing Fields Foundation*  
Kathy Sessions, *Health & Environmental Funders Network*  
Amy Solomon, *Bullitt Foundation*  
Anne Summers, *Brico Fund*  
Laurie Valeriano, *Washington Toxics Coalition*  
Joy Vermillion, *Z Smith Reynolds Foundation*  
Sarah Vogel, *Environmental Defense Fund, formerly with Johnson Family Foundation*  
Antha Williams, *former Beldon staff*  
Lisa Wozniak, *Michigan League of Conservation Voters*  
Marie Zellar, *formerly with Clean Water Action*  
Ed Zuckerman, *League of Conservation Voters, State Capacity Division*