

Evaluation Report for The Beldon Fund

Prepared by:

Keiki Kehoe
Dan Cramer

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grassroots  solutions

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I. INTRODUCTION

As the Beldon Fund wound down its giving, it contracted with Keiki Kehoe and Dan Cramer to conduct a comprehensive final evaluation to examine goals, strategies, accomplishments and challenges across programs, and explore lessons learned over the past ten years of grantmaking.

- **Evaluation Objectives:** This evaluation is not intended to be a comprehensive assessment of the entire spectrum of grants, or each individual program area. Rather, the objective of this project was two-fold:
 1. To provide the Beldon board with an analysis of the Fund’s impact over the past decade.
 2. To inform and corroborate an external communications plan that is being conducted.
- **Qualitative Evaluation:** This evaluation is entirely qualitative in its construction. It consisted of an extensive series of personal interviews, combined with an exhaustive document review, and a final blind survey. The interviews sought to identify the most common themes, lessons, and observations about Beldon’s work. The evaluation also attempts to measure progress against a series of benchmarks that the foundation established. The benchmark assessment was conducted as part of the interview process.
- **Candid Participation:** Input from all participants—Beldon staff, board members, grantees, policy-makers and seasoned observers of the foundation’s work, could not have been more open or forthcoming. People shared with remarkable candor and with an eye towards capturing and sharing valuable insights.
- **Timing Challenges:** One limitation of this evaluation was that, due to the timing, we were unable to include the culmination of all of Beldon’s efforts in our analysis. A major body of work represented in the Key States and Discretionary Programs is tied to non-partisan civic engagement efforts, and being able to examine the ultimate impact of these efforts would have been useful. The second limitation was the inability to fully evaluate Beldon’s investments in infrastructure, much of which was intended to be sustainable over time. Evaluating the sustainability of these infrastructure components would require a broader lens and a much longer timeframe than this evaluation was able to perform. Notwithstanding these modest limitations, this evaluation did capture, review and analyze a significant body of information resulting in very specific findings.
- **Report Framework:** This report begins with an Executive Summary and a description of the methodology used, and is then organized around two primary components:
 1. Key Findings: Synthesizes consistent feedback, experiences, successes, challenges, and suggestions from across all of the interviews.
 2. Case Analyses: Studies four aspects of Beldon’s grantmaking in significantly greater depth, to test specific hypothesis and capture relevant lessons. Each of the Case Analyses describes the conditions before and after Beldon’s involvement. The Case Analysis are *not* included in this public version of the evaluation report for confidentiality reasons. A separate report that provides a narrative on Beldon’s work draws on the lessons captured through the Case Analyses.

II. OVERVIEW OF FINDINGS

- There is a strong consensus that Beldon’s grantmaking efforts were successful. Significant qualitative evidence confirms that internal programmatic benchmarks were met.
- Beldon’s emphasis on capacity building in general and collaboration in particular is widely seen as having produced positive results, including stronger organizations, better alliances, more sophisticated advocacy skills, and tangible public policy impacts.
- Although collaboration offers many benefits, there are also real challenges including vision, partners, resources, competition, structure, and culture that impact effectiveness.
- Beldon successfully modeled the importance of non-partisan civic engagement strategies and tools. More organizations now see the tangible benefits of an integrated approach to policy change, and there is a high level of confidence that the impact of investments will continue.
- A perceived expansion of Beldon’s focus to broader civic engagement collaborations is seen as illustrative of the foundation’s flexibility. It is generally viewed as a positive strategy, even as a minority found it to be a problematic shift in the foundation’s emphasis.
- Environmental health issues are attracting mainstream attention, in large part because of the growing sophistication of advocates, the engagement of new allies, and the establishment of a new field of philanthropy. Beldon has been at the center of these developments.
- Investment in the SAFER strategy for advancing state-based environmental health campaigns is an example of how states can be laboratories for federal policies.
- Beldon demonstrated the importance of state-based work, and helped to create state/state and state/national synergies.
- The effectiveness of Beldon’s capacity building investments was strongly influenced by the leaders implementing the work on the ground. The importance of finding the right people was particularly critical given Beldon’s limited time frame.
- The Beldon strategy was built in part on a willingness to innovate and take risks in order to achieve larger goals. Although some high profile investments fell short of expectations, the distinction between success and failure is not necessarily always black and white.
- Beldon placed a premium on learning-based work and emphasized the importance of evaluation, but could have done an even better job at tightening its own benchmarks.
- Beldon worked diligently to prepare for its sunset. The Fundraising Support Program and Beldon’s outreach to other funders has helped to prepare many grantees.
- Beldon successfully assumed many roles including partner, problem-solver, and promoter, although at times challenges resulted as a consequence of playing these multiple roles.

III. METHODOLOGY

A. Meta-Strategy Review: This component of the evaluation explored the principal strategies of the Beldon Fund, and assessed the work across program areas and geographic locations. We looked deeply into three overarching strategies: building the musculature of the environmental advocacy community, increasing civic engagement, and broadening the base.

For each of these strategies, we first established what the Beldon Fund was trying to achieve, how it pursued those goals, and what happened as a result. The objective of this inquiry was to discern the impacts, successes, and challenges of the respective strategies. By looking across programs and geographies, we were able to identify themes and lessons that both the Beldon Fund and other donors would find of interest. Although this was not an exhaustive analysis of individual grants or program areas, it did enable us to assess at least elements of the programmatic benchmarks that were most relevant to the Beldon Fund, while avoiding a lengthy benchmark-by-benchmark study. In our approach to the meta-strategy review, we:

- Identified the best candidates to interview, as well as the best type of questions to ask, through in-depth conversations with Beldon staff and input from the evaluation committee.
- Developed an interview guide tailored to each area of inquiry and conducted the interviews.
- Examined documents, including grant requests, previous evaluations, grant reports, news coverage, and information provided by individual grantees.
- Analyzed and synthesized key findings from across the interviews and materials.

B. Case Analyses: For the Case Analysis portion of this evaluation, we conducted four separate studies wherein we explored specific Beldon Fund initiatives in-person and in greater detail. Each of these cases was framed as a story, or parable, that illustrated a different facet of Beldon's grantmaking strategy. By exploring these cases in depth, we were able to test the underlying funding strategy and provide concrete examples of the impact and lessons. In our approach to the Case Analysis we:

- Identified case study candidates through the mega-strategy review.
- Presented case ideas for discussion to Beldon Fund staff and the evaluation committee, and agreed upon the four cases that seemed most appropriate.
- Identified a parable or key question to explore as part of the case analysis.
- Conducted five site visits, supplemented by phone interviews and a document review.

Please note, the case analyses have been removed from this edited version of the evaluation to protect the confidentiality of participants.

C. Blind Survey: At the conclusion of the evaluation, all meta-theme participants were given a final opportunity to share additional confidential feedback via a completely anonymous online survey, to ensure that people had multiple chances to offer critical feedback.

IV. GOALS AND BENCHMARKS

There is a strong consensus that Beldon’s grantmaking efforts were successful. Significant qualitative evidence confirms that internal programmatic benchmarks were met.

A. External Perceptions: Beldon grantees, colleague funders, and informed observers were asked to reflect on the impact Beldon’s funding has had over the past decade. Their experiences and observations are reflected throughout the findings of this report. Below is a small sampling of the consistent comments people provided when they were asked: “What difference has Beldon made?”

“In every Beldon state there is some sort of rapid response mobilization system that is in place now.”

“There is now a national conversation on chemicals because of their funding, and only because of their funding. Beldon has been the backbone, super structure, steel girding that has made that possible.”

“We are a lot bigger, stronger, tougher, better organization...”

“Look at the growth and maturation of the state leagues and their connection to the national leagues. This is one of the best examples of the success of the Beldon investment strategy.”

“Our community is more sophisticated and organized than we were 8-10 years ago.”

“Grassroots organizing is now respected, understood, and a key component of any campaign, along with professional communications that you stick to. Plus, campaign planning, and how to apply things in the electoral arena.”

“The environmental health movement is totally different because of Beldon. The overall capacity of the movement is so much bigger.”

“But for Beldon, we wouldn’t have had states passing these (environmental health) bills.”

“Educating grantees and the donor community around all of the facets of the civic engagement work wouldn’t have happened if Beldon hadn’t come on the scene....the impact they’ve had on other funders’ understanding of what it means to do civic engagement, how you do it, and why you should do it.”

B. Beldon Benchmarks: Midway through the spend-down period, Beldon established a collection of benchmarks to help define programmatic success. The foundation’s general approach to internal evaluation is examined in the finding on Learning and Evaluation, but this section of the report is devoted to highlighting success in relation to the benchmarks. By design, this entire evaluation was meant to be qualitative in nature, focusing on consistent themes that cut across program areas. A grantee-by-grantee examination of the benchmarks

did not occur. That being said, the evaluation interviews yielded a wealth of information pertaining to the benchmarks that is embedded throughout the report. This section summarizes the benchmarks results, and provides direction to the relevant findings, where more information can be found.

Human Health and the Environment:

1. Has the base of constituencies broadened beyond the traditional environmental movement? Is there active engagement of health professionals and health-affected groups, giving the movement a more “human face?”

- *The base of constituencies has broadened beyond the traditional environmental movement, as evidenced by the engagement of nurses, doctors, and health affected organizations in chemical policy reform efforts in the eight SAFER states and nationally. These new constituencies, particularly nurses and breast cancer advocates, are giving the movement a more “human face.” (See finding on Environmental Health.)*
 - Nurses are involved in environmental health activities in nearly two-dozen states. They have been active in chemical policy debates in at least eight states.
 - Breast cancer advocates are leaders in the national Safe Cosmetics Campaign, and are active in chemical policy efforts in California and Washington State.

2. Have Beldon grantees been able to engage champions among policy and decision makers? Have there been concrete victories?

- *Beldon grantees have engaged champions in the governor’s offices and state legislatures, leading to concrete policy victories in several states. Champions at the federal level are emerging. (See finding on SAFER.)*
 - Washington and Maine have achieved the most far-reaching chemical policies to date, with successes in addressing toxins in products marketed to children. Other policy victories have occurred in Michigan, Minnesota, California, and Connecticut, with progress noted also in Massachusetts.
 - Federal legislation was introduced in May 2008, sponsored by Senators Lautenberg and Boxer, and Representatives Solis and Waxman.

3. Has there been an increase in public debate and civic engagement on these issues?

- *There has been a dramatic increase in public debate on environmental health issues, as evidenced by the steady drumbeat of media attention to public concerns about chemicals in consumer products. Advocates are calling 2007 “the year of the toxic product,” referring to a series of high-profile stories about toxic chemicals in everything from dog food to children’s toys. Mainstream awareness of the connection between chemicals in the environment and human health began peaking last year, and has continued on a steady upward trajectory through the first half of this year. Public pressure has prompted policy makers to act, and has led to high*

profile companies pulling products off store shelves and pledging to reformulate the chemical composition of some goods. Advocates engaged in environmental health campaigns are experienced in market campaigns and are learning to use civic engagement tools to enhance the impact of their efforts. (See finding on Environmental Health and SAFER.)

Key States

4. Have there been concrete examples of an increase in power and clout of the environmental advocates in the Key States? Have we moved the numbers? (e.g. Scorecard trends.)
 - *There are concrete examples of an increase in the power and clout of the environmental advocates in most of the Key States. (See finding on Capacity/Collaboration, as well as the Wisconsin/Florida Case Analysis.)*
 - In Minnesota, Wisconsin and Michigan, the recently passed Great Lakes Compact is seen as vivid evidence of an increase in power and clout.
 - In North Carolina, environmental issues were important in recent elections; advocacy groups report that the Speaker of the House is their leading legislative champion. Another indicator of the increasing power and clout of the environmental community is the fact that other constituencies, such as labor and choice, are approaching them to tap their grassroots muscle.
 - In Minnesota, using Conservation Minnesota's ranking system, a clear positive trend is visible over the past five years, with Senate rankings going from 52% to 81% and House from 45% to 69%.
 - In Wisconsin and Minnesota, the environmental organizations are now seen as driving the legislative environmental agenda, rather than reacting to legislator's actions.
5. Have grantees demonstrated their ability to mobilize supporters in the key areas of the state?
 - *Grantees have, in many instances, demonstrated their ability to mobilize supporters in the key areas of the state, although this is difficult to fully measure in a qualitative study. (See findings on Collaboration, Civic Engagement and Environmental Health.)*
 - In North Carolina, North Carolina Conservation Network's (NCCN) 9,000 members include activists in all 100 counties. They are growing their base in key geographic communities (such as Greenville, Raleigh, Greensboro, Charlotte), with good success. Organizing in two of those communities was a factor in a successful power plant fight.
 - In Wisconsin, the statewide environmental lobby day has experienced exponential growth in terms of both quantity and quality. In 2005, 125 people participated with little effort to target. In 2006, 250 people participated, including one constituent for

- each assembly district (only missed three districts). In 2007, 430 people participated, including one “right messenger” per district (achieved, except for a few districts). In 2008, 500 participants registered and 200 attended during a blizzard. This year featured 99 facilitators to organize the conversation, though some cancelled because of inclement weather.
- In Wisconsin, the number of activists in a key region (Northeast) has grown from 773 in November 2006 to 1,702 in April 2008. The action alert open rate averages a healthy 20-25%.
 - In Minnesota in 2007, the Minnesota Environmental Partnership (MEP) field program generated 91 calls, 16 letters to the editor, and more than 15 events attended by 115 activists in targeted areas.
6. Are grantees working with other policy advocates beyond traditional environmental concerns to build civic engagement capacity?
- *Grantees are working with other policy advocates beyond traditional environmental concerns to build civic engagement capacity. Across all of the Beldon Key States, including Florida, grantees are working in close collaboration with non-environmental community policy advocates to increase civic engagement effectiveness. The primary vehicles for this work are c-3 tables, which have been widely embraced. (See findings on Collaboration and C-3 Tables.)*
7. Are income streams being diversified? Are increasing numbers of donors giving escalating amounts of financial support? (Fundraising support program.)
- *Income streams are in the process of being diversified, particularly for recipients of the Fundraising Support Program. The jury is still out on the level of success of these efforts for other grantees in the Key States, and those participating in the c-3 tables (See finding on Sustainability and C-3 Tables) but the following examples illustrate great progress.*
 - One Beldon grantee has fully replaced Beldon funding with major donors and others sources, and expects to have a \$5 million endowment when Beldon funding ends.
 - A state-based environmental advocacy network has deepened and expanded its base of financial support. Increased funding is coming from major donors, individuals, an online auction, and activation of its grassroots activist base on behalf of other organizations.
 - A thirty-year old national environmental advocacy organization has expanded beyond its canvass-only fundraising strategy, building donors through direct mail and electronic solicitations.
 - Donor collaboratives are present or emerging in Wisconsin, Florida, and Minnesota.

Discretionary Program

8-9. Has Beldon support helped grantees to enhance key capacities, including adopting new methods of identifying supporters, and collaboration with allies? Are mechanisms in place to capture and share the resources of civic engagement - lists polling, message development, training?

- *Beldon support has clearly enhanced key capacities, including adopting new methods of identifying supporters and collaboration with allies. Mechanisms are in place to capture and share the resources of civic engagement, such as lists polling, message development, and training. Beldon has been a driving force behind improving important advocacy and civic engagement capacities. Its emphasis on environmental and c-3 tables across states has facilitated collaboration with allies, as well as the sharing of civic engagement resources. Beldon has helped grantees significantly improve their polling, message development, and communications abilities. Through its work with national partners/grantees, Beldon has helped state-based grantees have access to key technologies to improve dramatically their ability to reach individual supporters. (See findings on Collaboration, Civic Engagement, and C-3 Tables.)*

10. Has Beldon been successful in encouraging other environmental funders, who may have been reluctant to fund outside of their traditional issue areas, to look more broadly at citizen participation efforts?

- *At this point it is unclear whether Beldon has been successful in encouraging other environmental funders who may have been reluctant to fund outside of their traditional issue areas to look more broadly at citizen participation efforts. While other funders have certainly emerged, and Beldon has certainly contributed to this, it is not clear to what extent purely environmental funders have made this shift. This would be worth examining in the future, as funders may continue to gravitate towards the work. (See Sustainability finding.)*

Benchmarks Across all Programs

11. Have there been synergies between, and across programs?

- *Beldon has been largely successful in linking and achieving synergies through its programmatic work. There are definite synergies between the Key States and Discretionary programs, and between the state and national work. Although efforts have been made to increase the synergy between the Health and Key States program, the connection between the two is not as strong. (See findings on state/national synergies, SAFER and C-3 Tables.)*

12. Has Beldon been successful in building the funder base of support and ensuring continuity of program interests beyond 2009?

- *As described above, many of the anchor grantees in the Key States program are diversifying their funding, in part because of Beldon's Fundraising Support Program. Beldon has been successful in developing strong partnerships with donors in Wisconsin, Minnesota, and North Carolina; these colleagues are expected to help sustain core work in those states. New*

partnerships are being developed to support the Environmental Health work, including what is likely to be a significant new investment.

Outreach to other philanthropists to support this work appears promising, but has not yet resulted in sufficient new funding to ensure continuity of all aspects of the Health program. Beldon's deep investments in key grantees in the Discretionary program has laid the groundwork for new foundations to step in and provide on-going support. (See finding on Sustainability.)

13. Have grantees developed tools and strategies for facilitating work with allies beyond the environmental community?

- *Grantees have developed impressive tools and strategies for working with a broad array of allies. As described above, the civic engagement activities, such as the c-3 tables, have enabled many of Beldon's grantees to develop collaborative working relationships with non-environmental constituencies. In the Health program, groups are working in close partnerships with other constituencies at both the state and national levels. (See findings on Collaboration, Civic Engagement, C-3 tables, Environmental Health, and SAFER.)*

V. IMPACT OF CAPACITY BUILDING/COLLABORATION

Beldon’s emphasis on capacity building in general, and collaboration in particular, is widely seen as producing positive results, including stronger organizations, better alliances, more sophisticated advocacy skills, and tangible public policy impacts.

- Focused Organizations: There was broad consensus across the interviews that Beldon’s emphasis on capacity building and infrastructure development helped organizations focus their advocacy efforts by avoiding what many see as the trap of funding project or issue specific work and then having the chase for funding drive the agenda. This sentiment was held not just by grantees (who naturally appreciate the flexibility), but also by seasoned observers. The overarching point made by many is that this approach to funding infrastructure permits groups to build a strong foundation and allows groups to function in an “ambition” mode rather than a “survival” mode. Beldon’s support allowed organizations to fund core staff, often organizers, and core operations. This, in turn, allowed the organizations to focus on their advocacy work and then, in the minds of many, be able to make a stronger case for additional support. Typical comments included:

“Investing in capacity gives you a platform to fund core staff, including development people and senior staff. It gives you a launching pad for everything else you do.”

“Power and good organizing lead to more money—just need help getting started.”

“Too few have any appreciation for the cost of building an advocacy machine. Build members, build coalitions, hire the right staff and training, that’s what it takes and organizations were able to focus on this.”

- Multi-Issue Collaboratives Improved Community Relationships: Through its funding, Beldon placed a huge emphasis on collaborative efforts, initially within the environmental community, and subsequently through broader c-3 tables. Collaborative vehicles that were established helped create stronger bonds between organizations and helped to strengthen relationships in the environmental community. Groups that, in the past, tended to splinter were able to develop a greater sense of trust through regular meetings, trainings, and other activities. This took place in Wisconsin, Minnesota, and to a lesser extent, Michigan and North Carolina (Florida being the primary exception). Having formal collaborative vehicles helped elevate thinking beyond a short-term “what’s in it for me” mentality to a longer-term, more strategic focus. It is also important to note that a major factor that contributed to this community strengthening is the fact that the collaborative vehicles were sustainable and multi-issue in nature. That is, they transcended single issue campaigns and instead revolved around providing the space and core infrastructure to advance multiple issues, or to play either offense or defense over time.

“With a coalition, we build more relationships and longer relationships. The campaign mentality can be good, but it can exclude a lot of groups whose issues are not in a campaign. Build a strong coalition and the investment is really in strengthening the movement.”

- Stronger Advocacy Foundation: The collaborative efforts permitted allied organizations to achieve efficiencies of scale—leveraging tools and resources across organizations that few, if any, could have afforded on their own. This, too, is a key element of a sustainable multi-issue collaborative, as distinct from isolated single issue collaborative campaigns.
 - Organizations benefitted from joint polling and communications training to sharpen their environmental messages. One example is the work of the Minnesota Environmental Partnership. As described by multiple people, the member organizations have come to really understand the importance of language and messaging. In the beginning, organizations “loved the trainings,” but didn’t really “get” message. Flash forward to the past couple of years where the organizations are now making suggestions to test visuals and other elements in focus groups that never would have occurred to them previously. Few of these organizations could have afforded either the training or the focus groups on their own, but through the collaborative they all benefitted and improved.
 - The collaborative efforts and the shared use of tools and resources are widely seen as having helped elevate the environmental sector as a whole. This professionalization would have been difficult to achieve one organization at a time, so the collaborative vehicles helped provide essential “fuel” to the individual skill development of the participating groups. As one person succinctly explained:

“Beldon’s involvement has helped professionalize the sector. As part of the increased credibility of our groups, collectively we can deliver more, follow through more and retain good talent for lobbying, research, and organizing, so it is not just a rag tag effort strung together.”
 - The collaborative vehicles allowed for an easy lesson and skills transfer between organizations of various capacity levels. Many people offered examples of times where more experienced organizations were able to assist groups that were newer to advocacy, based on relationships developed through the environmental collaborations.
- Impact on Power and Policy: The collaborative vehicles also provided a foundation for coordinated goal-setting and agenda development and, in some cases, joint advocacy and communications planning, along with coordinated legislative campaigns. These efforts are widely seen as having significant impact on both the perception of the environmental community, as well as specific policy fights.
 - In Wisconsin, collaborative efforts and clear community priorities are seen by advocates and policy-makers alike as having shifted the setting of the environmental agenda from the legislature to the environmental community over a period of six years.
 - In Minnesota, an engaged observer explained that the Minnesota Environmental Partnership helped transform the perception of the community. “Years ago they were a hurting collection of groups. They would go to the legislature and ask, and get rolled. The c-3 groups were afraid to play and the c-4s threw their weight around . . .and there was no really good lobbying or message operation. All of those things are working right now. They have had a lot of victories.”

- In North Carolina, conservationists have had a series of policy victories, starting with a “clean smokestacks” power plant regulation, followed by clean drinking water and landfill legislation and, most recently, the establishment of a global warming commission. According to one conservation leader: “Every year or two, there was a significant landmark environmental victory.”
- In Michigan, there is now a renewable energy standard on the table – it has not passed yet but the environmental collaborative is uniformly seen as instrumental in advancing it even this far.
- In Wisconsin, Michigan, and Minnesota, the legislatures passed a “Great Lakes Compact.” This is the absolute top priority of the environmental community and a victory would have been “unthinkable” in Wisconsin and Michigan as recently as four years ago. In working through this session, multiple people mentioned the high levels of trust, and how all of the environmental groups remain on the same page with an ability to integrate activities across groups. These are seen as direct outgrowths of the joint agenda setting process coordinated by Beldon grantees.
- In Minnesota, in the early days of the collaboration it was common to have over 50 competing priorities. In 2007, MEP scored success in three out of four items on their jointly set agenda.

These examples are not meant to imply that the only cause of the victories was the presence of the environmental collaborations. Clearly other factors, such as changing legislative demographics and higher issue profiles also contributed. However, there is broad agreement across all types of interview participants that the presence of the collaborations and the ability to prioritize issues played a major role in both these specific victories, as well as on the broader perception of the environmental community being more powerful.

One illustrative comment neatly summarizes thinking about the benefits of collaboration:

“The first few years I would have gone screaming away with my money if I funded this collaborative. There were so many hurdles, but they stuck with it. If you are willing to keep investing and you get the right people, then you can go through and deal with all of the internal and organizational politics and, over time, really show that if we all work together we can do more. That commitment is really important. The impact on the community is real and profound. Really been able to succeed the last few years—they put out an agenda and they win. The payoff has been within the legislature, the organizations themselves, and their power to get things done.”

VI. COLLABORATION CHALLENGES

Although collaboration offers many benefits, there are also real challenges including vision, partners, resources, competition, structure, and culture that impact effectiveness and, potentially, sustainability.

- Common Vision: There was a strong consensus among Beldon grantees and experienced observers that collaborations are strongest when they emerge organically from a shared set of values and a common vision among groups. Organizations are motivated to collaborate for a variety of reasons. For some it reflects a core value: “We had a fundamental analysis that the way to make social change is to collaborate.” Others see it as the most effective route to reach a specific goal, such as passing a state policy.

Beldon’s deep belief in the value of collaboration and its commitment to remaining issue-agnostic in its support of the Key State collaboratives led to some confusion, particularly in the early years. While many valued the flexibility of Beldon’s support, others described a frustrating lack of clarity among the partner organizations, and the feeling of being “rudderless” at times. There was also a sense that Beldon was occasionally too forceful and stepped beyond mere encouragement of collaboration. In the words of a couple of people:

“There were some places where Beldon threw people together and they floundered for a long time.”

“I am a strong believer that coalitions need to emerge organically. It is good to encourage a culture of collaboration and communication, but stop there.”

- Partners: Having the right groups at the table to achieve the specific goals of the collaboration is another key factor identified by many. Key State grantees commented that some of their efforts to collaborate were “too grand” in scope, and included organizations that people thought should be there, rather than only those who wanted to be there. Parallel observations were made by health grantees, one of whom used the term “random acts of inclusiveness” to describe the pressure to “look more broad and inclusive” than was needed to actually get the work done.

Figuring out which groups to include in a collaboration requires a clarity of goals and an understanding of the external context. A participant in the environmental health collaborative in Maine described the Alliance as having “strategic diversity,” meaning that it had all of the right elements that were needed to achieve its goals. In contrast, some observers of the Key States Program felt that Beldon did not pay enough attention to issues of race in states like Florida and Michigan.

“They were missing a piece that other states have learned the hard way, which is that you need organizations of color.”

- Resources: Collaboration is an expensive strategy in terms of time, money, and human resources. In describing what made collaborations successful, many pointed to the importance of funding as a critical element, and expressed doubts about the viability of

sustaining collaborations if funding is not provided. Dedicated funding allowed groups to hire central staff and/or allocate staff time from partner groups to take on new pieces of work on behalf of the collaborative. For others, particularly those in multi-state collaborations, funding made it possible to meet face-to-face and build relationships. And quite importantly, a central source of funding was used by some as a tool for holding groups accountable for their commitments.

While funding can smooth out the workload and make collaboration easier, it can also create its own set of problems. There are many critics of “funder driven” collaborations, and foundations are routinely criticized for having too heavy a hand. As some observed:

“When a funder puts money on the table, it becomes all about the money. The groups will argue about who gets how much and then go back to doing what they were doing.”

“I have now been in half a dozen settings where the Beldon state collaboration concept is ridiculed. People say as soon as money disappears people go back to hating each other.”

While this critique may have been true in some of Beldon’s efforts, most notably in Florida, and at times in Michigan, it was not the dominant experience among those interviewed for this review. However, the difficult challenge of discerning the motivations of groups participating in a funded collaboration was a theme that emerged across programs. Grantees that had convened collaborations stressed the importance of understanding whether a group was joining in order to cover their payroll, or whether the work truly resonated with their organization’s mission. Funders were urged to pay attention to this dynamic and avoid fueling a dysfunctional system.

“There is some sort of lesson about maybe pushing some collaborations too far, too fast. Ask is this a real relationship, or is it a funding mechanism?”

“My advice to a funder? Tell them if they build it, you’ll fund it. Your job is to fund it, not build it.”

- Competition: Many people identified competition between groups as the most significant barrier to collaboration. The pressure on organizations to maintain their institutional identity and promote their own work creates a very real set of tensions. Beldon recognized these tensions and sought to help its grantees realize the benefits of collaboration. In some cases their efforts were successful, but in others real challenges emerged. In Michigan, competition and conflict among the groups undermined the collective effort. In Minnesota, where the environmental collaborative was established as an independent entity, it was seen as a threat to some partners. This dynamic is increasing as Beldon funding ceases, and the collaborative may be competing for the same funding as some of its individual members. The issue poses real questions about the sustainability of the collaborations over time.

“All of a sudden we are both grabbing at the same dollar.”

- Structure: There are many models for coalition structure among Beldon grantees, particularly in the Key States where groups experimented in the early years, and evolved in their approaches in more recent years. While there are some advocates for a large, structured collaborative, the model is difficult to sustain without significant funding. Grantees from both Wisconsin and North Carolina pointed to the high cost of the original environmental collaboratives as a principal reason they did not continue.

“The structure overshadowed our ability to do good work...”

“The overhead of the collaborative took an enormous amount of time and energy.”

The alternative that has emerged in some of the c-3 tables is to support collaboration with minimal staffing and no public profile. Although this approach is still relatively new, it appears to be working in most states where it is being tried.

- Culture: Open communication, transparent decision-making, and accountability created a culture that supported healthy collaboration. Lack of trust, suspicion, and in-fighting created conflicts and prevented effective work. In Michigan, a highly-charged split within the environmental community has eroded relationships between key individuals and will take time to repair. In Florida, there was deep seated mistrust from the very beginning. The more subtle aspects of trust and culture are generally difficult to discern early, but obvious splits are detectable with proper investigation. Many acknowledged how difficult it is for an outside funder to fully understand the unique dynamics that will shape a particular collaborative, but the importance of paying attention to these factors was underscored.

“I wouldn’t say this collaboration hasn’t worked, but it has been extraordinarily painful and very labor intensive.”

As discussed in the previous section, the Key States collaboratives were structured to provide a platform for work across a number of issues, making them quite different from a traditional issue-based coalition. Nevertheless, the environmental health coalition in Maine offers an interesting example of a healthy, issue specific coalition, with lessons that could be applied in other contexts. The leaders of that group raised money specifically to invest back into the coalition, and offered its partners the opportunity to participate in a three-day Rockwood course focused on leadership and collaboration skills. This measure was not prompted by a crisis, but instead by the forward-looking leaders of the coalition who recognized the importance of maintaining a well-functioning effort.

“It is by far the most effective coalition that we are involved in. We figure out what is the most important role for us to play, we submit it, and we are accountable.”

VII. CIVIC ENGAGEMENT IMPACT

Beldon successfully modeled the importance of non-partisan civic engagement strategies and tools. More organizations now see the tangible benefits of an integrated approach to policy change, and there is a high level of confidence that the impact of the investments will continue.

- General Benefits of Civic Engagement Work: One of the most significant impacts of Beldon’s work, consistently cited by grantees, other funders, and seasoned advocacy and observers alike, is the foundation’s “relentless” focus on the importance of adding nonpartisan civic engagement to the arsenal of tools needed to successfully advance public policy change. Beldon is widely credited with helping make the case that, in the absence of civic engagement power and capacity, policy issues will continue to stall, with little attention from policy-makers. The benefits of this approach, as articulated across interviews, include the fact that civic engagement tools are now seen as part of a critical base to build on.

“Civic engagement is one of the keys to building the house of policy change. You can’t start the house without the foundation and civic engagement has now become part of the foundation. Your house doesn’t sink into the ground. You can have physical foundation like a table or a list, or a file, and build on top of that.”

There is also a widespread recognition that, ultimately, organizations hit a “ceiling” if their focus is limited exclusively to advocacy and lobbying. As one observer explained:

“I think it is an extremely smart approach – anyone who has done a lot of advocacy understands that you can spend scores of millions and the ceiling on what you can accomplish is often determined in elections.

- Specific Tools: A few tools/resources in particular have really broken through, thanks—according to many—to Beldon’s leadership role.
 - Lists: Beldon recognized the importance of working from and reporting back to both effective membership lists and accurate lists of voters. The impact of this emphasis on lists is that many more organizations are now both more strategic with their resources, and more accountable. They can now report concrete numbers and contacts in their public policy campaigns, and in their nonpartisan civic engagement efforts, in a way that was far more diffuse in the past - if reporting happened at all. In addition, helping make voter files available through the c-3 tables (discussed in more depth in the next section), has resulted in less duplication across groups, and the ability to have better data for a lower price.
 - List Support: Beldon is also widely credited with supporting on-the-ground technical support to c-3 organizations using membership and voter files in their public policy and civic engagement activities. This is seen as a break-through innovation, as in the past, those few organizations that actually did have access to technology often could not use

it effectively, and many organizations that are newer to these tools are in even greater need of support.

- *Modeling/Targeting:* Thanks to Beldon's assistance in introducing sophisticated modeling technologies, more organizations and participants in public policy campaigns and civic engagement work can achieve greater efficiencies by identifying the best individuals to contact for certain public policy or public education campaigns. As one organization leader explained:

“The more we advance the technology of civic engagement, both on national and state by state levels, the better off we all are - because you run better programs. If I give you a list with models on it, such as marital status, issue interest, and responsiveness to vote by mail, you then won't spend money inefficiently. All of that makes for better organizing.”

- *Candidate Education:* In the 2006 elections, Beldon helped support nonpartisan efforts in two states (Wisconsin and Michigan) to inject environmental issues into the election process through various methods of candidate education. A similar pilot effort was also tested in Maine on a smaller scale. The results of these efforts indicate that it is possible to insert environmental issues into an election in a nonpartisan manner, and begin to get traction with policymakers on the issues as these candidates become policymakers in their states.
- Impacts: The evidence of Beldon's influence is how many organizations now integrate more sophisticated strategies into their public policy and nonpartisan education work in an ongoing manner.
 - These changes are reflected in dollars being spent, staff deployed, and tools being used, such as data and targeting, by a number of organizations across Beldon states.
 - In addition, higher numbers of grantees use sophisticated communications tools, and messages that are tailored to a particular region.
 - In states where Beldon invested most, some environmental organizations are seen as now having power in coalitions that they did not have ten years ago. They are now seen as valuable allies because they bring a high degree of sophistication, due to understanding advocacy and civic engagement tools, and strategies. They are also seen as being better able to deliver on commitments and promises than in the past.
 - Civic engagement tools lead to better issue campaigns. Adding targeting and micro-targeting data about four issues to the file in Michigan (health care, clean energy, choice and education funding) has encouraged many organizations. Many organizations are running active campaigns on those issues because the data is available. Organizations appear galvanized by the “plumbing” or infrastructure that is now there.
 - The canvass work being done in some states, such as Minnesota, is not only adding data to state databases, it is also helping organizations build up their canvass capacity, which

has positive organizational impacts and will have a huge impact on civic engagement and public policy advocacy in the years to come.

- Sustainability Potential is Indicative of Civic Engagement Traction: Many people acknowledge the “pioneering” role that Beldon played in bridging the environmental, advocacy, and civic engagement worlds. However, there is a widely held belief that this work is now moving out of the pioneer phase and will remain a fundamental element even after Beldon is gone. People point to this as evidence of a culture shift within and across organizations. It’s not that civic engagement work was done simply because Beldon was providing funding, but rather because it is now seen as a valuable organizational asset. The confidence in civic engagement sustainability stems from the fact that huge expense was associated with building the civic engagement “plumbing,” and now that the plumbing is in.

VIII. SHIFT TO BROADER C-3 COLLABORATIONS

A perceived expansion of Beldon’s focus to broader civic engagement collaborations is seen as illustrative of the foundation’s flexibility. It is generally viewed as a positive strategy, even as a minority found it to be a problematic shift in the foundation’s emphasis.

- **Beldon’s Flexibility:** There is a definite perception across states that Beldon’s focus began to shift, beginning around 2004, and culminating in the Big Bang Funding of 2007-2008. The move is generally seen as a broadening (rather than an abandonment) of the foundation’s historical emphasis on environmental funding and community-specific collaboration, to a heightened interest in broader cross-sector collaborations (environment, labor, social justice, health, etc). The vehicles for these collaborations are c-3 tables supported by Beldon in all five of the Beldon Key States (FL, MI, MN, NC, and FL).

The focus on the c-3 tables is widely seen as one example of Beldon’s flexibility as a foundation. A number of factors are seen as contributing to this flexibility.

- The foundation’s general power-building frame which asks what it will take to make dramatic change take place on environmental issues in a given state. This frame is widely seen as encouraging strategic shifts, as necessary, to react to changing dynamics.
 - The foundation’s focused time horizon, which drives a passionate interest in seeing change happen as quickly as possible, which in turn fosters innovation and a results focus.
 - A small and nimble board that was close-knit and willing to make decisions quickly.
 - Ready access to a legal expert who could provide context and help find solutions. Having an attorney as an officer and resource to the board is seen as having helped the decision making process and instituting changes in direction as seamless as possible.
- **A Strategic Imperative:** Concentrating more on the c-3 tables is considered a calculated reaction to a realization that rapid and large-scale change on environmental issues required more than environmental funding. There are some who thought that this broadening of focus was long overdue. This perspective is accurately captured by the following comment:

“They wanted to have power in the states and should have realized earlier that environmental groups would not get there on their own. We were getting creamed nationally, and in states, and realized we needed more power, needed to be more aggressive. Needed a bigger strategy that would help lift all boats, needed to make profound shifts in states, and that required a different model. The positive side is that Beldon learned its lesson. The negative is that they should have done it sooner.”

Most people, however, including grantees and observers, applauded the foundation’s willingness to exhibit flexibility and make the shift when it did. They saw it not as a

rejection of the more focused environmental community work, but rather as a natural extension of Beldon's overall approach and culture.

“Get the sense that Beldon kind of evolved in how they viewed sector involvement. At one time it was just environment-focused, but they appear to have come to the same conclusion that many have, which is that in this day and age, there needs to be general ... power-building, so that the environmental groups can go out and make the change that they want to see happen. That is a good analysis that is very sophisticated, and they came to it in alignment and partnership with some of their more sophisticated organizations that were coming to the same conclusion.”

- Efficiencies and Economies of Scale Viewed as Significant Table Benefits: Among the many benefits flowing from the c-3 tables that were consistently cited as the most critical to building power were reducing duplication and taking advantage of economies of scale. Across the interviews, many horror stories were told about efforts where “competing” c-3 programs literally stumbled over each other. Examples were given of nonprofit groups within the same state buying the contact lists from the same vendor over and over again because they were not working together, or in other cases, groups not being able to afford polling or training because it was too expensive. The c-3 tables are seen as addressing these problems.
 - The Michigan table estimates that it has achieved collective savings of over \$700,000 on the list work alone. Even discounting this by 50% (which is probably too much), the result is still indicative of achieving enormous efficiencies.
 - In Minnesota, the c-3 table is sponsoring canvassing efforts to enhance the file at a cost that would be prohibitive to any one organization.
 - In Florida, the c-3 table successfully mapped organizational efforts in order to avoid duplication.
 - In Michigan, the filling of gaps has been taken to an even higher level through sophisticated mapping that allows all of the organizations to see where work is being done and what gaps exist.
 - Central communications hubs in Michigan, Minnesota, Wisconsin, and Florida provide coordinated message development and dissemination support to all of the participants in the c-3 table. Given huge deficiencies in communications capacity, this is seen as an enormous leveraging of collaborative capacity.
- New Relationships: Another benefit of the c-3 tables is the new relationships that are emerging. Across states, environmental groups are developing both new and deeper relationships with organizations that can help broaden their reach and impact. For instance, in Michigan, the League of Conservation Voters Education Fund (LCVEF) and the Ecology Center did a joint mailing with the Arab Community Center for Economic and Social Services and the Metropolitan Organizing Strategy Enabling Strength (MOSES an African American organization.) It was a mailing that used images of environmental justice, but

through the perspective of those communities. These are relationships that would not have been in place but for the c-3 table and the emphasis that Beldon placed on it with grantees. In Florida, the c-3 table led to a spin-off issue campaign to oppose changes in the state's initiative process that included environmental and social justice groups. The resulting new Save the Voter's Voice Coalition is seen as a direct outgrowth of the c-3 table, and the leading players are Beldon grantees.

As one person summarized the relational benefits of the cross sector collaborations:

“First and foremost it has helped organizations work together and know each other in way they never had before. There is a sense of unity, connectivity, and cohesion that has never existed before. Saw people in communities and across communities who didn't know each other. Totally new relationship-building and that is something that has had more impact and ripples than you can even see on the surface.”

- State Autonomy/Connectedness: A final benefit of the shift in emphasis has to do with the power some leaders feel that it gives them on a state level, in relation to national dynamics and organizations. While this did not come up nearly as much as some of the other benefits, it is noteworthy nonetheless, as it addresses what has been a long-standing concern. The point that was made is that the tables help provide a center of gravity that allows organization in a given state to come together to determine a strategy, and to have that strategy to drive discussions with national organizations that want to invest in the state, especially in the latter parts of an election year. This is a profound shift in dynamics from as recently as 2004, when many state organizations felt like they were trampled.

“The table has led to a dynamic where we, the inside groups, can work together to prevent national groups from pushing us around.”

The state tables also provide a connection with national tools and resources. In addition to being a link to national tools, the tables are a place where resources can be concentrated, which in turn helps attract other additional resources. This is seen as one of Beldon's major legacies in the making—its initial investment in the tables is viewed as providing a strong foundation and granting time for the tables to demonstrate some success, and thereby attract other resources. As one table leader observed:

“Their willingness to be an initial investor had a huge impact. By the time we brought in other donors, we already had a growth of about 20-25 new organizations that had come to the table. We had already secured the voter file contract and a number of things, on Beldon's investment alone, that then allowed us to bring in other donors.”

On the topic of connectedness, one piece of advice that surfaced with some regularity was the sense that Beldon could have done more to connect the various c-3 tables as they were evolving. This is acknowledged as an ironic concern given Beldon's huge emphasis on collaboration, but there is a perception that, as Beldon was working with tables in many of the states, it could have helped them connect with each other more formally. While this eventually happened organically, some leaders and observers felt this was an area where Beldon actually could have done a lot to accelerate the learning process.

- Major Skepticism by a Minority of People: A few grantees and seasoned observers expressed a very contrary point of view. They see the tables as something “forced” by Beldon in a “rushed direction change.” While this is a minority viewpoint, the amalgamation of concerns did arise with enough frequency that they are worth noting. The most frequently cited problems with the strategic shift in emphasis included the following issues:
 - A belief that Beldon was pushing groups to participate in the c-3 tables that were ill suited for civic engagement work. As one person explained:

“I am just not sure that groups are equally good at all of those strategies, and not sure Beldon really appreciates that. Some groups are just better advocacy groups, and others better [civic engagement] ... groups, and not sure of their calculus.”
 - A concern that the shift from an environmental focus to a broader “focus through the c-3 tables” actually set the environmental groups back by taking time away from their core work and bringing them into relationships with organizations with whom they had little in common. More than a couple of people expressed a strong sense that it became confusing whether the focus was on advancing environmental issues, or educating the public on a broader array of issues. Some found this blurry focus made them exceedingly uncomfortable.

“The evolution from environmental tables to broader ... tables screwed things up. It became more about ... [multi-issue] and less about the environment. Changed the whole issue dynamic and people spent a lot of time sitting with people they didn’t have anything to work on with. Nice to meet people, and should lead to collaboration, but often led to frustration.”
 - The final issue raised was that Beldon just changed their emphasis too quickly and dramatically, without adequately explaining why, or in furtherance of what vision. While this is partially a process critique, the underlying concern is that it actually diluted Beldon’s credibility on the ground in the states, because it felt pretty random.

IX. TRANSFORMING ENVIRONMENTAL HEALTH

Environmental health issues are attracting mainstream public attention, in large part because of the growing sophistication of advocates, the engagement of new allies, and the establishment of a new field of philanthropy. Beldon has been at the center of each of these developments.

- **Mainstream Concern:** Environmental health advocates dubbed 2007 “the year of the toxic product,” referring to a series of high-profile stories about toxic chemicals in everything from dog food to children’s toys. Mainstream awareness of the connection between chemicals in the environment and human health began peaking last year, and has continued on a steady upward trajectory through the first half of this year. A steady succession of news stories led to heightened public concern about toxic toys over the holidays. That controversy prompted a response from policymakers, keeping the issue in the forefront of the news for many months. Most recently, public concern over a previously obscure chemical in plastic bottles has prompted major retailers, such as Wal-Mart and Toys R Us, to voluntarily stop selling baby bottles and some other products that contain the chemical. Nalgene, Playtex, and other manufacturers have agreed to reformulate their products.

“Just look at the hits for baby bottle, lead in toys, lead in lipstick reports. Number one story on Yahoo and Google news in two days.”

“Lead in toys became part of the common culture this past fall.”

“If you talk to anyone in the field over the last five years, the amount of coverage of environmental health news has increased dramatically. Newsweek and Time articles in the last two weeks...”

This is in striking contrast to the situation described in the earlier evaluation of Beldon’s environmental health program. At the mid-point of this program, less than four years ago, there was relatively little public awareness of these issues and no coherence in the messages being communicated by the advocacy community. This spike in public awareness did not happen by accident. It is the outcome of a multi-faceted strategy that has fundamentally reshaped the way the public and policy makers think about toxics in the environment and their connection to human health. It reflects a convergence that includes the growing sophistication of advocates, effective engagement of allies, and an increasingly educated group of environmental health philanthropists.

“A number of forces have converged, and Beldon is the middle.”

- **Reframing the Issues:** Over the past decade, advocates in the environmental health movement have fundamentally shifted the way they talk about issues and conduct their campaigns. Leaders of what was formerly known as the “toxics movement” warned the public about poisons in the environment, pointing to iconic stories about Love Canal and Cancer Alley. For the public, these were horrific tales about other people in other places. The reframing from toxics to a broader environmental health message reflects a growing sophistication among advocates in their understanding of how to connect to people in ways that are effective. Breakthroughs in the scientific community spurred the further evolution

of advocacy by showing that everyone is exposed to health risks from the chemicals in everyday products. And advocates became even more powerful when the science pointed to the significance of exposures during certain times of a person's life, rather than simply looking at cumulative lifetime exposures. This set the stage for compelling campaigns.

“How people think about the science is in a transformative place. Five years ago it was about how much you were exposed to and now it is about when you are exposed. And the science is still evolving.”

“There is a much more nuanced understanding of how chemicals work in the environment, and in our bodies, and in particular in children.”

Beldon was at the center of this parallel evolution between scientific understanding and sophisticated advocacy. Its support helped translate the science and connect the advocacy community with expertise from researchers and health professionals. This evolution helped set the stage for meaningful engagement of new allies and constituencies.

“We were able to achieve mainstream awareness of contamination of common things in your home and what it means for your health because of the collaborative model and what Beldon supported.”

“What's more visceral and frightening to a parent than to think there are toxics in your kid's toys? It moved from being abstract to a reality.”

- New Allies: A core principle of Beldon's environmental health work has been to engage and activate new constituencies, particularly health-affected groups and health professionals. As the case analysis of Beldon's work with nurses shows, the foundation has stimulated and supported significant engagement among nurses at the state and national levels. The following examples, which are in no way exhaustive, are indications of the increased levels of engagement among new constituencies:
 - Across the country, nurses are active on environmental health efforts in their homes, workplaces, and communities. In nearly two-dozen states, nurses are engaged in a variety of campaigns aimed at understanding and reducing chemical exposures. They have been active in chemical policy debates at the state level in Washington, Maryland, California, Connecticut, Massachusetts, Minnesota, New York, and Michigan.
 - Breast cancer advocates have been leaders in the Safe Cosmetics Campaign, which has succeeded in getting more than 600 companies to agree to remove toxic chemicals from their products. They have been leaders in California, and involved in Washington State.
 - Organizations that represent learning disabilities have been integral in policy campaigns in Maine, Michigan, and Massachusetts, among other states.
 - Pediatricians and state medical associations have been active participants in state policy campaigns in Maine, Michigan, and Washington State.
 - Planned Parenthood is becoming more involved in state-based campaigns in Washington, California, and Maine, and is creating patient, clinic, and advocacy information.

- Churches, unions, children’s advocates, and many others are participating in state-based advocacy efforts across the country. Prominent unions, environmental justice organizations, health-affected constituencies, and others joined with state and national environmental groups in endorsing a federal proposal to overhaul chemical policy.
- Philanthropy: Building a base of philanthropic support for environmental health has been a priority for Beldon for most of the past decade. As a leader in the Health and Environment Funders Network (HEFN), Beldon played a central role in helping grantmakers make the connection between the environment and health, and helped establish environmental health as a legitimate field within philanthropy. What began as a small group of funders only a decade ago has grown into a formal affinity group of 130 member foundations, representing a diverse range of donors and program interest areas. Since its inception, HEFN has sought to increase its ranks through outreach and education to both environmental and health grantmakers. It has offered environmental health institutes at all but one Environmental Grantmakers Association (EGA) retreat over the past ten years, and multiple workshops for grantmakers at every EGA gathering.

Only a few years ago, there was a large divide between environmental grantmakers and mainstream health funders. Over the past five years, Beldon and its colleagues in HEFN have made significant progress in bridging the divide. Years of outreach to Grantmakers in Health (GIH) has paid off, and now HEFN regularly organizes environmental health sessions at GIH’s annual meetings. These have proven to be valuable opportunities to expose health funders to key organizations and leading edge campaigns and strategies.

The net result of these efforts has been a steady growth of foundations joining HEFN and becoming a part of an active conversation within the world of philanthropy.

Through its involvement in HEFN and its direct funding of health constituencies, Beldon has played a critical role in helping build the field of environmental health philanthropy.

“Nurses are the singular adoptive child of the Beldon Fund. Within philanthropy, having the engagement of nurses as advocates has made it much easier to talk to other funders about toxics as a health issue.”

Now that these connections have been solidified, Beldon is working with HEFN to reach out to the regional associations of grantmakers in states that are at the forefront of chemical policy reform. If successful, this strategy will bring an entirely new set of smaller, state-based grantmakers into this work, diversifying and deepening the field even more.

X. STATES AS LABORATORIES: THE SAFER STRATEGY

Investment in the SAFER strategy for advancing state-based environmental health campaigns is an example of how states can be laboratories for federal policies.

- **States as Laboratories:** Since its inception, Beldon has built its grantmaking strategy on the belief that action at the state level is a powerful means for influencing policy makers in other states, and ultimately at the federal level. The concept of using states as laboratories for building the power of environmental advocates is reflected in Beldon's Key States strategy. The idea of using states as laboratories for incubating innovative chemical policies is exemplified in the development of the SAFER strategy. The SAFER example illustrates the potential in terms of impact, as well as the challenges.
- **The SAFER Strategy:** Five years ago, environmental health advocates at the state and local levels were pursuing a wide range of strategies, with little connecting them other than personal relationships between leaders and the networking function of Coming Clean. The lack of a coordinated and coherent policy ask was identified in the 2003 review of the Beldon's environmental health program. The establishment of SAFER in 2005 directly addressed this problem and enabled a subset of organizations working at the state and national levels to develop multi-state strategies, and coordinate their efforts in a way that built toward a goal of changing federal chemical policy by 2020. Careful scoping of the capacity of groups, the policy context, and the policy opportunities at the state level, led to the initial selection of three states, and now to eight states. Among those engaged in chemical policy efforts, there is widespread consensus that SAFER represents a significant leap forward, and that Beldon deserves significant credit for helping make it happen.

“When we started this thing...it was all disconnected... Beldon has done a good job of connecting it and carrying the water and funding it.”

“It has allowed us to be nimble and opportunistic in a way that we simply weren't able to do when we were all operating in isolation”

- **Impact:** State-based policies are being proposed and advanced in the eight SAFER states, as well as other non-SAFER states. Public concern over toxics in toys and other consumer products has helped fuel interest among policy makers, which has, in turn, fueled even greater media coverage and public attention to the issues. As one DC insider observed:

“It seems like barely a week goes by when someone hasn't pushed something forward in one of the states.”

Over the past few years, chemical policies at the state level have been advancing rapidly. At the time of this review, new developments were happening on nearly a daily basis, making it impossible to keep an accurate running tally of state actions. The following are highlights from the SAFER states to date:

- In Maine, the “Kid’s Safe” chemical policy act was passed by the legislature and signed into law. This victory followed on the heels of earlier state policies restricting the use of arsenic, flame retardants, and mercury.
- In Washington, the “Toxic Toys” bill was passed by the legislature and signed into law following a successful legislative fight to ban flame retardants.
- In Michigan, the legislature is moving to ban Lindane, a toxic chemical used in children’s products. Earlier, the governor issued an executive order on green chemistry, and the legislature passed a bill banning lead in children’s products.
- In Minnesota, successful passage of a “toxic toys” bill was later vetoed by the governor. Other policy victories in the state addressed mercury products, flame retardants, and electronic waste.
- In California, bills banning phthalates in toys and requiring disclosure of chemicals in cosmetics were successful; building on earlier victories on bio-monitoring and a green chemistry initiative by the governor.
- In Connecticut, a “safe alternatives” bill was advanced in the legislature; earlier policy action addressed pesticide use on fields and playgrounds.
- In Massachusetts, a comprehensive bill is moving through the legislature.

Leaders of several of these efforts spoke to the value of Beldon’s investments in helping make it happen. By providing both strategic coordination and communications capacity to enhance the work across states, SAFER provided important resources.

“The states need both in-state capacity and the joint collaboration to succeed. The PBT bill would not have passed in Washington without SAFER. The fact that there were other campaigns happening in other states allowed us to spread the resources of our opposition and collaborate across state lines.”

Another component of the SAFER strategy is to help groups working on state policy integrate civic engagement tools into their work. Groups in Minnesota, Michigan, and Maine are the most advanced in this area. SAFER groups have received some training, and a model candidate questionnaire is being developed for groups to use in each of the states.

This strategy validates the theory that states can, in fact, serve as laboratories for the development of policies, and that those policies will build toward federal action. As this review was being completed, a federal proposal was introduced in both the House and Senate. This move represents a second phase in the SAFER strategy, which is to bring the successes from the states to the national policy arena.

“We set up an infrastructure at the state level to feed into a national movement for reform, but the national piece isn’t set up.”

- **Tensions:** Although this strategy has enabled Beldon to focus its investments in an effective multi-state effort, using the states as laboratories has inherent challenges. Implicit in this strategy is the recognition that more can be accomplished by working at the state level. As one person put it:

“Innovation can flourish at the state level. In DC, it is a bunker mentality.”

This comment reflects the long-standing tensions between state and national advocates. National advocates think state-based groups have a much easier job, and therefore can maintain an unrealistic level of idealism. State advocates assume that the nationals think of them merely as foot soldiers, important to advance the lines of battle, but ready to be sacrificed when necessary. Observers of the SAFER strategy say that it has helped address this tension to position the state groups as more powerful partners in this perennial state/national dynamic.

“It has leveled the playing field between national and state groups. There has been a sea change, so nationals see the need to partner with states.”

“It side-lined the older environmental groups who had lost their vision and capacity and allowed for the flourishing of state campaigns.”

Groups working at the national level expressed frustration over the strategy to invest so heavily at the state level, arguing that it has blocked the ability of national advocates to do their job of moving policy proposals forward. They point to differences between the state and national groups as one of ideology, reflecting different viewpoints on the role of precautionary approaches versus risk assessment.

“You had the funders only funding one side of a very strong ideological divide.”

An inherent assumption in the “states as laboratories” strategy is the notion that federal lawmakers will consider what the states have done in crafting their own proposals. But advocates at the national level have been hard-pressed to find congressional leaders willing to propose the kind of policy solutions that have passed at the state level. This has caused an additional set of tensions between groups within SAFER, many of whom are strongly committed to the policies they have advanced in their own states. Although most have endorsed the proposed federal legislation, the fact that the opening shot falls short of expectations is a difficult pill to swallow. As one observer surmised:

“There will be a tortured relationship between the state and federal initiatives. It’s about to become more unfriendly and uncomfortable.”

- **Beldon’s Role:** Much of the success of the SAFER strategy has been attributed to Beldon’s active participation and willingness to go the extra mile to support this effort.
 - **Relationships:** Beldon has worked hard to ensure that the groups participating in SAFER have healthy relationships and are working well together. This has not been easy, particularly during the past year, as groups spent many months in negotiations over the

components of a federal policy proposal. Beldon is credited with intervening at strategic times to try to bring groups together to work through their differences. And Beldon has played an important role behind the scenes, nudging and cajoling groups to be better partners and collaborators. This willingness to step in and help groups recognize the importance of working together has been one of Beldon's hallmarks, and has laid important groundwork for the groups to continue to work together in the future.

“There is more coherence, more trust, and more good will and cooperation now than there was two or three years ago, and SAFER deserves a lot of the credit for that.”

- *Resources:* Beldon has been in the lead in funding SAFER and one of the strongest advocates for others to invest in the strategy. Many have observed that SAFER's dependence on Beldon as a funder raises questions about its financial viability after 2009. Working with its partners at the John Merck Foundation and the Marisla Foundation, Beldon is reaching out to new donors and educating them about the opportunities to invest in this effort. The recent introduction of federal legislation signals the beginning of what may well be a decade-long fight over chemical policy reform. Additional resources, and likely at higher levels, will be needed over the long haul to see this process through to completion. The outcome of Beldon's efforts in terms of bringing more funders to the SAFER table remains to be seen. Some promising prospects are on the horizon, but replacement money is not yet in hand.

XI. IMPORTANCE OF STATE-BASED WORK

Beldon demonstrated the importance of state-based work, and helped create state/state and state/national synergies.

- Importance of State Work: By focusing much of its attention and resources at the state-level, Beldon validated the importance of state work and helped give standing to advocates working on state policies. The investments in the Key States strategy provided a level of resources that were previously unheard of in these states. As a result, groups in that program have, in many instances, built capacity and are at least beginning to exercise more power and clout. Grantees spoke to the power of being chosen as a Key State, the validation it gave their work, and the implications it had for attracting other support.

“When we were going out to other groups in the state and could say ‘a national foundation’ has partnered with us, it gave us the legitimacy.”

“Doing place-based grantmaking as a national funder is precedent setting.”

Beldon’s commitment to state work goes well beyond the Key States strategy, reflecting values that were strongly embedded in earlier incarnations of the Beldon Fund. Many of the people interviewed for this review knew John Hunting years ago, and recalled Beldon as one of the few national funders that understood the importance of state-based work. Health grantees felt that Beldon’s investments underscored the importance of work at the state level, and helped hold national groups accountable for a more collaborative strategy.

- State/State Synergies: Beldon fostered important synergies between state level groups.
 - *State Conservation Voter Leagues*: Beldon has long been an anchor-funder of the State Leagues, and an important supporter of the Federation infrastructure that strengthens this work. The Federation’s central staff, its consultants, its technical assistance, and its training have enabled state voter education groups to build their capacity and effectiveness. Annual gatherings of Federation members have provided opportunities to build relationships across state lines, and learn new tools and best practices.
 - *Peer-to-Peer Gatherings*: The cross fertilization of strategies, tools, and ideas made possible by these annual gatherings was an important way for Beldon to reinforce best practices and inspire leaders to think in new and different ways. The gatherings are discussed in more detail in a subsequent finding on learning and evaluation, but it is worth noting here that they are considered an important element of state/state connectedness.
 - *Coming Clean and SAFER*: State-based work is at the core of Beldon’s Human Health and the Environment Program, and support to both Coming Clean and SAFER reinforced state campaigns. The Coming Clean network ensured that the voices of grassroots and environmental justice groups were heard, and SAFER enabled state-based advocates to build strategic and synergistic campaigns.
 - *National Caucus Environmental Legislators*: Support from Beldon enabled this ad hoc group of state legislators to become a national organization. By connecting state

legislators with each other, and providing them with model legislation and examples of states tackling similar challenges, NCEL provides infrastructure and synergy for state-based policies. NCEL's efforts have brought many environmental health issues to the attention of legislators, and emboldened policymakers to advocate for strong policies. Beldon's support of nurses has opened the door for NCEL to recruit nurse legislators as members, and to provide forums for health professionals to directly educate legislators.

“States will not lead unless someone else goes first. Legislators are always asking the question: ‘what other states have done this?’”

- *State Environmental Leadership Program (SELP)*: Beldon's long-term investment in state environmental leaders enabled groups to build relationships and learn from each other. For many, the annual SELP meetings were a time to commiserate with colleagues about common obstacles, and to exchange ideas about how to become more effective. The participants in this network value it highly.
- State/National Synergies:
 - *LCVEF/Federation of State Conservation Voter Leagues*: Beldon's commitment to build the LCVEF at the national level, and to simultaneously invest in the state league movement, helped bring these two entities into alignment. Observers pointed to the impressive trajectory of the state leagues over the past decade as an example of Beldon's legacy. Support from Beldon ushered in a new era at the national league and helped create the conditions which enabled the federation merger. This evolution significantly brought new synergies between state and national players, and brought state players to the table at the national level.
 - *Clean Water Fund (CWF), Sierra Club (SC), Public Interest Research Group (PIRG)*: A hallmark of Beldon's strategy was to invest in the large national groups that had strong field programs, such as Clean Water, Sierra Club Foundation, and the PIRGs. By investing in these groups, Beldon ensured that there were organizers and canvass operations up and running in critical communities throughout the country. As one observer put it: “Those organizations are now bigger and stronger and are doing business in a more collaborative way that will last.”
 - *Collaborative Defense Council (CDC)*: When national groups came together in the CDC, Beldon helped ensure that resources placed outside the beltway expanded the work. While other funders might have put their money into science, paid media, or public opinion polls, Beldon's emphasis on building strategic capacity in the field helped solidify the links between work on the ground in the states and inside the halls of Congress.
 - *Catalist, Information Staffing Services Inc (ISSI), Modeling, and C-3 Tables*: Beldon's presence in the national civic engagement world has played a major role in connecting national tools, resources, and support with state level efforts.

XII. PEOPLE/LEADERS ARE CRITICAL

[NOTE: Major elements of this section were redacted for confidentiality purposes]

The effectiveness of Beldon's capacity building investments was strongly influenced by the leaders implementing the work on the ground. The importance of finding the right people was particularly critical given Beldon's limited time frame.

- People are a Major Variable: Beldon's strategy depended on talented leaders to implement the work on the ground. The success and/or failure of many investments were determined by a simple equation: the right people, in the right place, at the right time. One of the lessons learned across all of Beldon's programs is that the unique abilities of individual leaders may be the single biggest factor in determining the success or failure of an investment. That is not to say that investments in capacity and infrastructure are not important, indeed they are essential, as even the best leaders without appropriate organizational capacity will struggle. The ultimate take away is that the right leaders, while essential, are not in and of themselves sufficient, as it is really a combination of people and capacity. However, the importance of finding the right leaders to invest in is a critical variable that helps elevate the likelihood of success.

"This takes a lot of time and the right people. Not nice people or good people, which we had, but the *right* people."

- Lessons for Funders: Foundations may invest in institutions, but people are the core of those institutions, and program officers are constantly called on to scout talent. This was especially true for Beldon, because its strategy was built on promoting ways of working that were often different from traditional approaches. In some cases, Beldon could rely on established leaders, but some of the more impressive breakthroughs came when they invested in emerging leaders. The ten-year horizon put added pressure on finding the right people early enough for the investment to pay off.

Finding the right leaders in any community requires a deep investment of time, developing candid relationships with trusted observers, understanding the context, and evaluating people through multiple prisms. Even after significant scoping, it may not always be possible to fully assess whether someone has the ability to take on the role that is needed, or even to find someone who is worth investing in. Grantees, grantmakers, and consultants all spoke to the challenge of an outside funder knowing who to trust, and getting unbiased information from any source. One person summarized it well:

"If you don't have the right players, don't go there. If you're unsure you have the right people, you can try betting on them. But if you know (even deep down) that you don't have the right people, don't bet. No bet is better than a bad bet."

XIII. RISK-TAKING AND DEFINING SUCCESS

The Beldon strategy was built in part on a willingness to innovate and take risks in order to achieve larger goals. Although some high profile investments fell short of expectations, the distinction between success and failure is not necessarily always black and white.

- **Willing to Take Risks:** Beldon is widely and positively seen as a foundation that was willing to take risks and experiment with innovative ideas in order to achieve its strategic and programmatic goals. The risks described across the interviews run the gamut from Beldon’s general approach to funding—relatively large multi-year grants, often for general operating costs—which is seen as the exception to the rule in the funding community, to investments in specific efforts which were judged to be high risk/high reward. Many people discussed Beldon’s willingness to place “big bets” in order to achieve big gains. The driving impetus for this culture of risk and innovation is perceived to be impatience with the status-quo, and a belief that more traditional approaches to funding would not result in the sort of policy and power-oriented change that Beldon was hoping to achieve. The time limited horizon was also seen as contributing to a culture that was not risk adverse.

It is important to note that, while Beldon is widely lauded for its willingness to take risks when necessary, the foundation is not seen as going out of its way to take on risk (with Florida being a notable exception, as people saw Beldon seeking out the big state). Instead, most people who discussed this topic used words like courageous, innovative, and strategic when referring to Beldon’s comfort with risk.

“We could not have won nearly what we have won without Beldon and some of the risks they took with us. They are not reckless, but they have been courageous funders.”

Examples of Beldon “pushing the envelope” to advance its programmatic objectives include:

- For a national funder, the decision to concentrate such a large portion of its investments in only five “key” states is considered risky. Considerable effort went into the selection of the states and, as is discussed in the case analysis, the upfront evaluation of the opportunities could possibly have been stronger. Nevertheless, the very fact that Beldon was willing to place such large bets on only a handful of states is evidence of the foundation’s comfort with risk in pursuit of its objectives.
- The entire environmental health strategy is seen as a risky, but critical decision to open up a new front in the battle for the environment. Beldon is widely seen as having put this field on the map through its leadership in the field and its persistent drumbeat encouraging groups to work both collaboratively and with new allies.
- The Safe Cosmetics Campaign was described a “just an idea” until Beldon became really invested. As one of the leaders described it, “Beldon decided to go over the cliff with us and when they did we became a real campaign.”

- Beldon’s investments in the CDC and the Partnership Project were an unprecedented effort to coordinate national environmental strategy at one of the riskiest possible times for such an effort. With the change of administration and the outright assaults on the environment, Beldon could have simply shored-up national groups to batten down the hatches. Instead, Beldon took the opportunity to challenge groups to work in new and different ways.
- Beldon’s support for Civic Engagement and Public Policy Advocacy Tools is seen as a significant risk that has paid off and is likely to continue to do so.
- Less Successful Risks – A Case Study in Florida and November 3rd: It seems obvious, but the natural extension of a willingness to take risks is that some of the big “bets” just won’t pay off, or will pay off far less than expected. Beldon’s investments in Florida as a Key State, and its funder convening effort to support trained field staff after the 2004 elections—labeled the November 3rd Project—are most often cited as examples of risks gone awry. Indeed, the word failure (especially from those closest to the foundation, including some staff and key consultants) comes up in relation to these two efforts far more than any other part of Beldon’s work.

On first blush, it is easy to understand why these two initiatives are considered failures. In Florida, Beldon made three substantial bets: on an emerging LCVEF affiliate, on a new Water Coalition, and finally, on a 2006 initiative that never even made it onto the ballot. Beldon essentially pulled out of the state over the past couple of years and clearly did not come close to “moving the numbers” in a manner that was seen in other Key States. In regards to the November 3rd project—a convening effort by Beldon to rally funder support for a novel capacity building initiative—Beldon not able to convince any other major funders to join in the efforts to keep staff employed and to help alleviate the boom and bust cycle of funding that wound up repeating itself after 2004. Ambitious plans to run permanent issue campaigns utilizing the 2004 field staff never bore fruit.

Without any question these are both examples of risks that did not come close to initial expectations. However, does that mean that the efforts failed? Contrary to initial reactions, there are in fact, clear success indicators in Florida, and at least a hypothesis that is worth testing about the success of the November 3rd project.

- *Florida, Positive Results*: A deeper examination reveals that Beldon’s work in Florida is still paying off, and that the state is in significantly better condition (thanks in large part to Beldon) than it was when the foundation began its work there in 2000-2001. The c-3 table that Beldon helped begin is still meeting and has spun off mini-coalitions to work on issue campaigns; a leading anti-poverty group continues to grow and is widely seen as strong and increasingly powerful; a new communications hub has just been established; and a new redistricting effort has incorporated many of the lessons from the past attempt. So, while specific Florida investments clearly did fail, there is a fairly strong consensus that withstands an objective examination that the overall strategy in Florida was not, in fact, a failure. It is important to note that even in the riskiest efforts, success and failure are not always as black and white as they may at first appear.

- *November 3rd Project Positive Results:* This same lesson also appears to hold true with the November 3rd project. While it is absolutely correct that efforts to attract broad-based funding failed, that does not necessarily translate into the project as a whole being a failure. Indeed, a number of very seasoned observers hypothesized that, thanks to this project, many organizers and other staff were able to “remain in the movement” at a time when they would historically have left. Being able to keep close to 110 staff employed in multiple states for up to six months was seen as providing a tremendous boost to many key organizations. While no study has been done on exactly how many remain in the movement today, enough people speculated that it is likely a high enough percentage so as to question the labeling of this project as an abject failure.

As one highly respected leader who had nothing to do with this project summarized:

“If the only measure of success is whether they got other funders then, yea, they failed. But that’s not the right measurement. The correct question is, were they able to help organizations keep staff that would otherwise be lost, and are these staff still organizing and working in the movement? While I can’t say definitively that that is the case, I strongly suspect it is, and that’s the sort of risk we need funders to take.”

- Lessons on Risk: In discussing and analyzing Beldon’s comfort with risk, two main lessons emerged across the interviews. The first is the importance of scoping and risk assessment before undertaking any project with a high degree of risk involved. While this may seem obvious, the higher the risk, the deeper and more intensive the scoping needs to be. If there is one consistent critique of the Florida work, it is that the initial scoping could and should have gone deeper, which would likely not have changed the decision to enter the state, but may have helped establish more realistic expectations.

A second lesson is the importance of learning from your work and investments as you go. Beldon is widely seen as helping to create a culture of accountability, and learning from, rather than being scared of, mistakes. This mentality is one of the major reasons that the foundation is perceived as having far more success than failure when it came to taking risks. Using this lens, it is possible to see that failure is not always failure, and that even when it is, it is not always necessarily a bad thing. While this may sound like a rationale for justifying some of the decisions that did not go as planned, Beldon’s comfort with risk is seen as such a big positive in fostering and advancing innovation, that it seems crucial to note how important the willingness to accept and learn from failure is to ultimate success.

“They are willing to take risks and make investments, and sometimes it paid off and sometimes it didn’t, but the important thing is they kept trying and learning.”

XIV. LEARNING AND EVALUATION

Beldon placed a premium on learning-based work and emphasized the importance of evaluation, but could have done an even better job at tightening its own benchmarks.

- Learning Based Culture: Beldon emphasized the importance of learning across all of its program areas. There is a strong sense that, hand-in-hand with the foundation pushing the envelope, encouraging innovation, and making significant investments, came a strong commitment to learning and evaluation. Beldon is widely seen as helping contribute to an emerging “culture of evaluation” in the advocacy and civic engagement communities.

As more than a few people explained, seven years ago there was very little analysis of what was working, in terms of specific strategies and tactics, to influence policy-makers and expand and engage the electorate in a non-partisan manner. Flash forward to the present, when more and more organizations are building evaluation into their plans and more funders are insisting on measuring results. What happened in between the past and present included significant encouragement and funding from Beldon for organizations to evaluate and explore specific components of their work.

“They helped fuel an evaluation culture which helps get more money. A number of experts have been doing evaluations for them for ten years, and it’s no secret that the trend of people looking more at advocacy and civic engagement is in part because Beldon helped evaluate it. This has led to a lot of additional side things, for example the assessment of the 2002 elections led to others getting into this field.”

“The really powerful thing they bring to the table is that they allow people to take risks, because they are always testing and evaluating and learning. They tried things that would either be a home run or a strike out, and in many cases there was a much greater chance of striking out, but as donors, they helped measure and monitor quality and this helps make it better over time. They always want to know what a good and bad outcome is and how it happened. They want to be able to share the lessons with other organizations and funders, even if it did not work perfectly.”

- Importance of Peer-to-Peer Gatherings: As important as funding-specific evaluations are the peer gatherings that have been a hallmark of the Beldon Fund. These gatherings, which bring together grantees from across states and program areas, are seen as highly reflective of Beldon’s evaluation and learning-based culture. The gatherings serve as a forum for sharing best practices, exchanging lessons, disseminating evaluation results, hearing from leading experts across fields, introducing the latest advocacy and civic engagement tools, studying emerging trends, and profiling successes and set-backs. The peer events are unanimously described as invaluable. The fact that these gatherings grew to include grantees in the health area, the Key States Programs, and ultimately broader civic engagement participants, was valued by many participants. And the level of engagement and participation in these events demonstrated the hunger groups had for learning from groups like their own, and for finding more effective ways to reach their goals.

“We presented at an early peer-to-peer, and at the next meeting everyone was doing it.”

In addition to sharing specific lessons and trends, the peer gatherings served as community-building vehicles which allowed learning to continue between the formal gatherings. Many organizational leaders described relationships they made through the Beldon peer events, and how they leveraged these relationships as they were starting or refining their own programs. This was often referenced in relation to learning about collaborative work, and people especially spoke to how the gatherings helped them better conceptualize joint planning and how to fill gaps, in the environmental community as well as in the broader progressive arena. Many people said that, if nothing else, finding a way to continue the peer events would be an ideal legacy for Beldon to leave.

- Beldon’s Self Evaluation: As an organization that emphasizes learning, Beldon is seen as having done a pretty good job of evaluating its own work. Over the past decade, it has invested in a series of evaluations, which gave the foundation staff and board critical feedback. As it neared the mid-point of its lifespan, external evaluations were used to help sharpen and hone the program work. At that time, the environmental health program had cast a fairly broad net, and the evaluation process helped the foundation identify some important strategies for deeper investments. The mid-course evaluation of the Key States Program came just before the strategy began to shift, focusing more on c-3 tables and less on the environmental collaboratives in some states. The evaluation process prompted the foundation to develop a set of specific benchmarks for measuring progress in each of its program areas, and across programs.

One area that could have been improved was further clarifying one of Beldon’s signature phrases, the idea of “moving the numbers,” and establishing corresponding benchmarks. Many grantees and observers remain confused about what exactly this means, beyond the general concept of increasing power. There is a sense that Beldon could have been clearer about what it hoped to see, and was looking for, in terms of results. Perhaps even more importantly, following its mid-term evaluation, Beldon would have benefitted from clarifying a baseline at that point in time. What were the “numbers” then, and what would constitute positive movement? The absence of this type of baseline data results in a more qualitative look at the foundations benchmarks, and greater clarity about the benchmarks would allow for more effective measurements.

In general though, Beldon is seen as modeling what it means for a funder to evaluate its own progress and make adjustments as necessary.

“They did a great job of evaluating as they went—what worked and what didn’t, and made changes. Hopefully other foundations can pick up this level of analysis.”

XV. SUSTAINABILITY

Beldon worked diligently to prepare for its sunset. The Fundraising Support Program and Beldon's outreach to other funders has helped prepare many grantees. Although grantees are nervous, much of the work that Beldon supported is expected to continue.

- Fundraising Support Program (FSP): Beldon launched the FSP mid-way through the foundation's life. The intensive program provided training to dozens of groups, and significant planning and implementation support to five organizations in the Key States Program. Recipients of the support expressed gratitude for Beldon's forethought, pointing to examples of how it had positioned them to survive Beldon's withdrawal. In the words of one grantee:

"It made all the difference for us. It was our roadmap for life without Beldon... I don't wake up at 2:00 AM worried about how I'll survive."

A Beldon consultant evaluated this program in 2007 and reported that the trajectory looked good for each of the four organizations remaining in the program. Her report documented the bottom line improvements for each group, which included increased budgets and decreased dependence on Beldon for support. It also detailed some of the important changes in infrastructure and organizational practices that were necessary for effective fundraising efforts.

The stories that emerged tell of many small steps leading to big changes, with impacts that are yet to come. Highlights include:

- One participant in the Fundraising Support Program not only was able to replace all of Beldon's funding with new, individual donors, it also expects to have a \$5 million dollar endowment when Beldon's support ends.
- Another grantee was able to turn its activist network into a revenue stream, not through direct appeals, but by activating its base in support of national policy campaigns. This activity is projected to generate as much as \$100,000 this year.
- A long-established national organization was able to break out of its canvass-only fundraising model. New programs to boost membership through online giving and direct mail, and to cultivate donors through personal contact, are paying off.
- The executive director of another state-based network is kicking the organization's fundraising into a higher gear. Although sensitive to the tensions around competition with member groups, it is building its donor base and restructuring its membership to generate more income.

Of the many factors that have shaped this program, three key elements were critical.

- *Leadership*: An executive director that has an aptitude for fundraising, and sees it as their primary responsibility, makes an enormous difference.
- *Organizational Culture*: Many of the changes that led to significant improvements reflected a series of group culture shifts. Transforming a board that gives advice to a board that gives money is enormous. Expanding the responsibility for fundraising beyond development staff, to include program staff and others, is also transformational. Investing in infrastructure to support fundraising, from functional data bases to donor communications, were all things that got priority attention, in part because of the FSP.
- *Innovation*: Effective fundraising strategies and techniques are continually evolving. Changing technologies are bringing new opportunities, and making old strategies obsolete. Beldon's support enabled organizations to be open and ready to test new tools, such as on-line auctions. Staying on top of these innovations will be critical in the future success of these organizations.
- Foundation Outreach: All of the skills that Beldon grantees were putting into practice in the fundraising support program were being replicated in a different way by Beldon's own staff and board. Staying focused on the goal of passing the Beldon baton onto other donors, Beldon worked tirelessly to educate, engage, and recruit its colleagues in the foundation world. Through leadership in EGA, Beldon has helped shape the agenda of the national convenings, and showcased many of its grantees in gatherings and forums of like-minded colleagues. Expanding out, Beldon has worked to identify new civic engagement funders. And, as discussed in the finding on environmental health, Beldon has played a central role in establishing and supporting the Health and Environment Funders Network.

Through these and other efforts, Beldon has successfully positioned many of its grantees to receive funding from other sources. For example:

Of Beldon's three programs, environmental health grantees seem to be feeling the most vulnerable. In partnership with key colleagues, Beldon has been actively reaching out to new foundations and some just-emerging philanthropists, helping them understand the lay of the land and the impact their dollars could make if invested strategically. The fact that this is a relatively new field of work makes it particularly attractive to donors who are new to philanthropy and want to make a mark. Some of the players on the horizon have the potential to bring funding that could dwarf Beldon's investments. Whether these new donors come through is something that bears another look in a year or two.

- Outlook: All of the people interviewed for this review were asked about the sustainability of the strategy and whether they saw support coming from other places as Beldon sunsets. The overwhelming sentiment was that no one is ready for Beldon funding to end. Some groups are better positioned to survive without Beldon funding, but few admit that they feel prepared.

“Nobody will replace Beldon; we're crazy if we think anyone will replace them. We'll find other funders, but not at the level that Beldon has been funding.”

At the time when many grantees were being weaned of Beldon support, the decision was made to increase funding to groups who seemed poised for breakthroughs. In the environmental health program, this may be paying off. As public attention increases, the prospect for continued support to the strongest groups is high. But, because this is a relatively new field of work, many environmental health grantees have their fingers crossed that new funding will be forthcoming. As one put it:

“The bench is not deep and the scramble is mighty. I know there has been an effort to bring in the other health funders, but I don’t see it yet.”

The initiation and multi-funder support of a national campaign around chemical policy reform is an affirmation of Beldon’s strategy. It is an indicator that the issue is ripe for major investments, and it demonstrates that Beldon’s perseverance in pursuing new foundations to join in this effort is paying off. The verdict is out on other new sources, but interest should grow as momentum toward federal action builds.

In addition to these intentional strategies, two examples of less-expected outcomes of Beldon’s investments illustrate the somewhat serendipitous nature of the funding world, and underscore the fact that the seeds sown by Beldon may bear fruit in unexpected ways in the future.

- An unexpected investment of significant resources in the infrastructure of the state leagues came at a very critical time. Although reaching out to this new funder was not part of the Beldon strategy, the impact this support is expected to have is a tailor-made fit to the capacity needs of these groups. Beldon’s decade-long investment in building the state leagues made this an attractive proposition.
- A new sizable investment in the Partnership Project and the Collaborative Environmental Campaign, long-time Beldon grantees, was contingent on providing evidence to the donor that the groups could collaborate effectively. Because of Beldon’s investments many years ago, the groups could confidently describe how they had developed constructive working relationships, and processes for making decisions and holding each other accountable. Had Beldon not made its earlier investments, it would have been much more difficult for these groups to make a convincing case.
- **Bottom Line:** Grantees, grantmakers, and outside observers all agree that it would be unlikely to find full replacement funding for Beldon’s many investments. Although some groups may struggle more than others to support the work, it seems fairly clear that the most important efforts will continue. As the examples above illustrate, the capacity that Beldon has built will not go away when the funding stops, in fact it will continue to grow in those organizations with capable leaders. The collaborations may take other shapes, but the practice of collaborating will likely continue. And the many civic engagement tools that Beldon helped to develop and deploy have fundamentally changed the way groups do their work on the ground; those who found these tools useful will not willingly abandon them in the future.

XVI. BELDON'S MULTIPLE ROLES

Beldon successfully assumed many roles, including partner, problem-solver, and promoter, although at times challenges resulted as a consequence of playing these multiple roles.

- Multiple Roles with Grantees: When the Beldon Fund announced that it would spend all of its money in a decade of grantmaking, it set its sights on some ambitious goals. Instead of simply supporting the status quo, Beldon chose to push the envelope, challenging groups to think differently about their work and employ new strategies, tools, and tactics to achieve greater progress. Doing this required a non-traditional grantmaking strategy, and a level of interaction with grantees and fellow funders that was very intensive. In the eyes of many, this resulted in the foundation staff assuming multiple roles. Some of the roles Beldon has played include:

- *Engaged Funder*: A consistent theme across discussions with grantees was how engaged Beldon became with getting to know them as organizations and as individual leaders. This is viewed as being strategically important, because a more in-depth understanding of the organizations is seen as allowing the foundation to connect dots and work closely with the organization, to help them think through how to maximize their impact. Beldon was described as both respectful of grantees and insightful about the obstacles nonprofits face. There was also a strong sense that grantees could be “honest” with Beldon about the challenges they faced, and avoid playing the type of “games” that many leaders feel are commonplace with other funders. Comments on these points include:

“There is nothing sexy in thinking about what groups need, and often what they need is really boring stuff, like development people, access to a lawyer, and knowing what the rules are.”

“They are hands off, but engaged. Respectful and glad to talk through things.”

“They take an approach to building relationships with grantees. Not heavy handed, but involved, and get to know the leadership and the organizations.”

“They know what they know and what they don’t. They don’t fund without mastering groups, issues strategies, or resources. They don’t go off half cocked.”

“Whatever premise they started with, you could be honest with them that things didn’t work, and that was okay and you didn’t get penalized. They ask great questions and help figure things out.”

- *Partner*: Beldon’s analysis of the lay of the land aligned closely with many of its core grantees. Leaders in the advocacy community describe Beldon as a foundation with a strategic understanding of what it takes to make change. For these grantees, Beldon was considered more than just a funder, but rather a *partner*. A partner who brought money, relationships, insights, and experience. Beldon staff and consultants worked

collaboratively with grantees to craft strategies toward mutual goals. This level of engagement led to a collegiality with the grantees that were brought into the Beldon “family,” and a shared sense of urgency of Beldon’s limited timeframe.

“I feel more like we are co-conspirators. We have a common understanding of what needs to get done.”

“It was more than someone writing a check. It was a strategic partnership. It really increased my confidence that the work we were doing was meaningful.”

“People looked at them as more of a partner. Trying to get anyone to understand the inner workings of an organization, especially a funder, is hard, and they did that.”

“The world of philanthropy that we all inherited is one where we are expected to lie to each other and the lies are really quite mysterious. No pretense with Beldon—write proposals for what is needed and they ask hard questions. The idea of partnership is extraordinary and clean.”

- *Convener:* Beldon’s recognition of the importance of relationships and peer-to-peer learning was reflected in the deep investment in convening grantees for trainings and strategy sessions. Throughout the interviews for this review, grantees referenced meetings that Beldon either sponsored or supported as critical events in their work. Information gleaned at peer-to-peer gatherings, strategies crafted at Commonwealth meetings, and relationships solidified at SAFER meetings were all cited as important building blocks for grantees.
- *Problem-solver:* Several grantees shared stories of times when Beldon stepped into a difficult situation and intervened. When needed, Beldon was able to move behind the scenes, listen to different points of view, and help groups work more effectively, both as individual organizations and with each other. This was an invaluable role which few can play well. Beldon’s ability to do this was based on trusted relationships with grantees, and the respectful approach it brought to the work.

“They don’t force an approach on you, but they help you think through your approach.”

“It’s actually pretty stimulating as a grantee. It’s rare to have substantive conversation. Really, a very unusual relationship in terms of level of interest and excitement for the work, and what’s being done, including input that is helpful.”

- *Promoter:* Beldon is a passionate and powerful advocate for its grantees, promoting their work to other grantmakers in a variety of forums. As discussed in the previous section, part of Beldon’s exit strategy has been to try and line-up other sources of support for key grantees. Foundation staff and consultants are carefully analyzing potential gaps in support for critical strategies, and working hard to find new sources of funding to ensure that the work continues.

“Once a funder owns part of what you are doing, then they are talking about it and it informs their other work. And that does nothing but good for the whole movement.”

“Often used them to convince other funders—they pick up the phone or send e-mails encouraging them to support our work and that doesn’t happen very often. Most funders don’t understand, let alone can explain it to others in a way that makes it sound compelling.”

“One thing they have tried to do, which is also incumbent on us, is make a connection with other national funders, and they have really tried, and it is really difficult to do.”

- Relationship Challenges: While there were many advantages to Beldon playing these various roles, there were also some challenges and frustrations. The overwhelming majority of interviews for this review were quite positive, but some included observations that pointed to tensions.

- *Expectations and Communication*: There was some sense that Beldon’s reluctance to be more directive-oriented sent mixed signals about what was expected. There was also a fairly high level of frustration (especially around the final Big Bang funding) that Beldon wanted grantees to “read their minds,” and did not do a good job of explaining what the foundation was hoping to achieve or wanted from their grantees. A couple of observations point to the communications challenges from long-time grantees:

“Usually your relationship with a funder is about the outcome. The relationship with Beldon is so much about the process....it hasn’t been really clear to me what they want to get done by spend down, or what they want to leave behind. It has been a weird guessing game.”

“Frequently found ourselves trying to figure things out for their deadlines and for what they wanted. We were behind. Much of this is on us, but there was a lot of back and forth and a lack of clarity. Communication was bad. Said they wanted brainstorm, but they really seemed to want us to zero in on something, and this wasn’t clear and eventually altered the conversation.”

- *Exclusivity*: Beldon’s emphasis on building a connected network of grantees had a downside. The strategy inherently required a distinction between Beldon grantees and everyone else, which created an insider/outsider dynamic. This was awkward when Beldon’s strategy shifted and the lines were redrawn, or when a group lost its funding for other reasons.

“It often felt like it was a bit of a club and Beldon was deciding who was in and who was out. It was difficult for groups that weren’t inside with Beldon, or didn’t stay inside. Sometimes it is hard to know why some groups were in the mix. It was hard to know how the winners got chosen.”

- *Influence:* There were somewhat mixed views about whether Beldon was too assertive with grantees. While Beldon is clearly seen as a highly engaged and interested funder, the general consensus (though not overwhelming) is that it did a pretty good job of balancing between being directive when necessary, while maintaining a hands-off approach on the details of implementing strategies.

“Can’t call Beldon directive, in fact maybe not directive enough. They have prodded, pushed, and nudged people to do things more effectively, and that is not being directive.”

But a few felt there were times when they pushed grantees too hard, not fully understanding what groups were up against. Some observed that Beldon was not consistent, trying at times to be a partner and other times to be a funder. This led to a frustration about what role Beldon was playing at any given time, and how much influence it was trying to exert. A typical comment on this point:

“Funders as partners does not really work. Sometimes at table and sometimes not—need to be clear about when. Middle ground is still needed. Partner versus funder shifted back and forth.”

- Role in Marketplace: In addition to the various roles Beldon assumed with grantees, the foundation is also widely seen as playing a valuable role in the broader advocacy, civic engagement, and funder community. Beldon is seen as occupying a unique role in the “marketplace” that is described as helping ideas and lessons flourish. The Beldon staff is widely seen as always actively engaged in an ongoing effort to learn what is going on, and emerging across the fields in which it funds. Many people described brainstorming calls with Beldon staff to kick around ideas or explore potential opportunities. They describe a foundation that loves asking questions, kicking over stones, provoking discussion, and connecting the dots. This is seen as incredibly valuable, because it helped provoke organizations and funders to explore and test new ideas and approaches. It is this role in the “marketplace” that is going to be especially missed by grantees, other funders, and others in the environmental and broader community.

“There are a lot of organizations that are going to miss the money from Beldon, but there is actually more trepidation about how to replace the role Beldon played in the marketplace. If Beldon cut funding significantly, but still played the other roles that it plays, the anxiety about them leaving would go down.”

- *Role with Other Funders:* Beldon has played an important role in the funding community as a leader, collaborator, co-conspirator, and partner with its colleague grantmakers. Through its leadership in Environmental Grantmakers Association, the Health and Environmental Funders Network, and the Funders Committee for Civic Participation, Beldon has helped shape the conversation among its fellow grantmakers about effective strategies, trends in the field, and opportunities to increase the impact of grantmaking. And by taking on the responsibilities of leadership, as founding partners, program committee members, and on management boards, Beldon staff has done much heavy lifting to ensure the smooth and effective functioning of these entities. As a funder that crossed between three different worlds of grantmakers: environment, health, and civic

engagement, Beldon was able to build bridges, share insights, and make connections between people and ideas. And by showing other funders that they can be bold in their grantmaking, Beldon has inspired others to stretch the limits of their own grantmaking.

“Beldon has created an incredible glide path for environmental funders to understand the political process in a different way. I give credit to Beldon for opening people’s eyes.”

“Marrying the issue focus and the civic engagement focus is unique. Most of the funders who focused on environment and health were building public awareness and engagement in the issues without overlaying that with a political lens.”

- **Beldon Staff:** In discussing the many roles that Beldon plays, as well as the foundation’s overall impact, many people gravitated towards a discussion of the Beldon staff, which received enormously high marks. While there might have been isolated complaints, across the board people often affirmatively, and without prompting, shared positive feedback about the skills, accessibility, and commitment of the Beldon staff. They are seen as driving forces behind the foundation’s achievements. The background of many of the staff and consultants as organizers, or former staff in the field, is also widely lauded as providing crucial hands-on experience. Without naming names, a sampling of comments include:

“Their role has been quite extraordinary.”

“In general, would say I have come to value them as just some of the most thoughtful, in the sense of strategic insight, people in the field.”

“It has been an inspiration to just see the depth of commitment. The best funding happens when it’s all about the cause and not at all about defining the individuals, and their utterly modest, self effacing, mission-driven approach really sets an example and is an inspiration for other funders.

“I hold them out as a shining star.”

XVII. FUNDER LESSONS

This final review of the Beldon Fund sought to identify overarching lessons from the past decade of grantmaking. Embedded in the findings are many observations that point to things that Beldon has done well, and some things that could have been better. Below is a summary of the lessons for other funders, based on the reflections of those interviewed for this assessment, and our own observations.

What should another funder interested in similar objectives know about Beldon's experience?

- Have a clear vision and goals. Focused investments are better than diffuse. Match the scale of resources to scope of challenge. Invest in thorough scoping.
- Communicate with grantees really clearly. Explain, and explain again, why and what you are doing, and what you hope to see as a result.
- Develop strong, respectful relationships with the groups you fund. Be as transparent in your funding decisions as possible. Build relationships with others in the geographies and fields in which you fund, to ensure that you are getting candid and diverse feedback.
- Find good people and invest in them. Provide support that helps develop leadership and sustains the leaders in the field.
- Build capacity. It will pay off if groups are building it for strategic purposes. Provide general operating support and multi-year grants. Be explicit about your expectations and insist on clear benchmarks and reporting.
- Encourage collaboration as a strategy by helping groups understand the value of collaborating. Be comfortable with the messiness and tension of collaborative efforts, and encourage grantees to work through these challenges. Maintain a balance between supporting and encouraging collaboration, but not forcing it. When funding collaboration, make sure the goals are clear, the groups are accountable, and that resources align appropriately.
- Collaborate with other grantmakers. Leverage your resources through relationships and funding partnerships. Provide leadership in the field by helping other philanthropists understand and identify strategic opportunities to make an impact.
- Build intellectual capital within the community of grantees and grantmakers. Invest in learning and staying ahead of the curve. Encourage innovation and risk taking. Investing in peer-based learning is very powerful.
- Be reflective, patient, and flexible. Evaluate your own efforts, and be willing to adapt as circumstances change.
- Be engaged in the political process. Use all of the tools in the tool box. There is a lot you can do as a c-3 funder that can affect major political and policy change.

XIX. POTENTIAL FUTURE EXPLORATION

As noted in the introduction, there were a couple of timing challenges, all outside of Beldon's control, that nonetheless impacted this evaluation. Most significantly is the fact that measuring the true impact and sustainability of many of Beldon's key investments requires a lens that extends beyond June 2008. A secondary challenge is that some important civic engagement investments were newly made, and in this instance, the timing also worked against a comprehensive measure of impact.

Given these limitations, the following sections detail the specific questions that arose during this project that would be worthy of additional and subsequent evaluation. A suggested process and timeline for evaluating these questions is also included.

A. Questions to Explore

- Capacity/Civic Engagement Issues:
 - To what extent does the Minnesota Environmental Partnership illustrate the power of a sustainable multi-issue collaborative vehicle?
 - To what extent are organizations supported through Beldon's Key States, Environmental Health, or discretionary programs continuing to collaborate in some form? Are these groups initiating collaborations and seeking funding for their support?
 - Did the investments in staff retention through the November 3rd Project in fact pay off by keeping people in the movement to such an extent that similar investments are worth considering?
 - Is more environmental policy passing in Key States?
 - What impact did investment in non-partisan civic engagement and mobilization have on turnout?
 - What impact did the c-3 collaborative have on increasing efficiencies and reducing duplication?
 - To what extent are the c-3 tables supported by Beldon sustained, and are they attracting new funding that allows them to do more than simply exist at a maintenance level?
 - Do key Beldon investments survive transitions from existing key leaders?
 - Were the organizations that participated in the Fundraising Support Program able to expand their base of donors and operations in Beldon's absence?

- Environmental Health:

- Is chemical policy reform advancing at the federal level? Is there an effective coalition of state and national advocacy organizations working collaboratively toward shared goals? Are advocates beyond the environmental community actively engaged in chemical policy reform efforts? Are there strong congressional champions advocating for policies endorsed by state and national environmental groups? Are the congressional representatives from SAFER states showing leadership on the issues?
- Are states continuing to adopt policies regulating toxic chemicals? Are groups continuing to collaborate at the state level, through SAFER or by another means? Do the coalitions working on state-level policy include the active involvement of constituencies beyond the environmental community? Are these coalitions working with others on effective civic engagement strategies? Is there evidence that their efforts are influencing the debate over chemical policy at the federal level?
- Are nurses actively engaged in chemical policy reform at the state and national levels? Are their efforts in alignment with the strategies of the environmental advocates? Is there evidence that their efforts are making a difference? Have nurses prioritized other environmental issues, such as climate change, for their policy advocacy? If so, are their advocacy efforts on those issues perceived to be making a difference in the policy arena? Do environmental advocates at the state and/or national levels view them as effective partners?
- Is the field of philanthropy supporting environmental health efforts growing? Are more foundations and individual donors supporting environmental health advocates, particularly those engaged in chemical policy reform? Are Beldon's core grantees, such as the SAFER groups, nurses, and breast cancer advocates receiving sufficient funding to support their work? Is support from Pew continuing?
- Are more environmental funders looking more broadly at citizen participation efforts? Are more environmental grantmakers willing to fund civic engagement activities at the state and national levels? Are more EGA members participating in the Funders Committee on Civic Participation?

B. Potential Future Evaluation Methodology

If there is an interest in studying some or all of these questions, we would suggest a multi-phased approach:

- Phase I: June 2008 - August 2009: During this phase, a combined quantitative and qualitative evaluation would seek to measure the impact of Beldon investments and collaborations. Steps would include:
 - Identifying specific tests to conduct.

- Working with organizations/tables to ensure that data is being collected and/or controls are established.
 - Identifying additional qualitative factors to measure the success of civic engagement strategies.
 - Identifying potential interview lists for immediate post-election interviews.
 - Conducting interviews in the months following the election.
 - Collecting and analyzing data as it becomes available, and voter files are updated.
 - Synthesizing results and findings in an evaluation report.
 - Presenting the report at appropriate venues.
- Phase II: Measuring Sustainability - January 2011: During this phase, a largely qualitative evaluation would seek to identify the true sustainability and impact of key Beldon investments over time. Steps would include:
 - Clarifying exact areas of study.
 - Potentially consulting with organizations on the best ways to measure sustainability and future impact.
 - Establishing a current baseline to use as measurement tool.
 - Letting time pass.
 - Identifying the best people in current positions to interview in approximately two years.
 - Conducting interviews.
 - Measuring progress/sustainability against initial benchmarks.
 - Synthesizing results and producing an evaluation report.
 - Presenting the report at appropriate venues.

XX. CONCLUSION

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. The dozens of people interviewed for this assessment shared their experiences, observations, and insights about the many ways that the Beldon Fund has made a difference. One theme that emerged throughout these conversations was the sense of impending loss people felt at the prospect of a world without Beldon. Groups that have benefited and thrived because of Beldon's support are predictably reluctant to lose an important funder, but the gap that Beldon will leave is far larger than that of simply grantmaking.

Beldon has challenged its grantees and fellow grantmakers to be more strategic, more collaborative, and more powerful. It has helped people understand the importance of connecting politics, policy, capacity, and civic engagement in ways that have been transformative. And, it has helped to define and establish the field of environmental health. The many roles Beldon has played, through the vision and leadership of its board and staff, will be sorely missed.

As Beldon prepares to sunset, many people asked: Why now? Why can't they keep going just one more year? What these questions fail to recognize is the impact of the decision to spend-out the foundation in ten years. Had Beldon chosen a more traditional path, holding back its resources in perpetuity, it would not have been able to make the kind of impact it has made. By deciding to spend out the foundation's assets, it was able to invest deeply in its core strategies, and take some risks in areas that were new and untested. It has pushed the envelope and established a new paradigm for innovative grantmaking. The ten-year timeframe gave the foundation more impetus to be bold, and enabled its grantees to be more effective and successful. While no one is ready for Beldon to sunset, the legacy it leaves will be continued and expanded for many years to come.

APPENDIX: INTERVIEW LISTS

Meta Themes:

- Margie Alt, Environment America
- Nan Aron, Alliance for Justice
- Mike Belliveau, Environmental Health Strategy Center
- Bob Bingaman, Sierra Club Foundation
- Jeff Blodgett, Wellstone Action!
- Joel Bradshaw, Consultant
- Charlotte Brody, Commonweal
- Monica Buckhorn, Consultant
- Tracey Easthope, Ecology Center (Michigan)
- Ryan Friedrichs, Michigan Voice
- David Gardiner, Consultant
- Page Gardner, Women's Voices, Women's Vote
- Wade Greene, Beldon Board
- Ruth Henning, Beldon Board
- Gene Karpinski, League of Conservation Voters
- Brian Kettenring, ACORN
- Matt MacWilliams, Consultant
- Dick Mark, Buttonwood Partnership
- Bill Meadows, Wilderness Society
- Steve Morse, Minnesota Environmental Partnership
- Pete Myers, EMS/SCN
- Sandy Newman, Newman and Associates
- Tom Novick, M+R Strategic Services
- Lana Pollack, Michigan Environmental Council
- Robert Richman, Grassroots Solutions
- Jeanne Rizzo, Breast Cancer Fund
- Judy Robinson, Environmental Health Fund
- Bob Schaeffer, Consultant/Center for Civic Participation
- Kerry Schuman, Wisconsin League of Conservation Voters
- Kathy Sessions, Health and Environment Funders Network
- Gregg Small, Climate Solutions (formerly Washington Toxics Coalition)
- Lael Stegall, Beldon Board, advisory board member of EHSC
- John Stocks, National Education Association
- Gail Stoltz, Consultant
- Anne Summers, Brico Fund
- Michael Vachon, Soros Fund Management
- Joy Vermillion, Z. Smith Reynolds Foundation
- Marie Zellar, Clean Water Minnesota

Michigan Case Analysis:

- Amy Chapman, ISSI
- Ryan Friedrichs, Michigan Voice
- David Holtz, Clean Water Fund
- Chris Mann, Consultant, MSHC Partners
- Steve Pontoni, ISSI/Michigan Voice
- Patrick Schuh, ISSI
- Tracy Sturdivant, representative to Jon Stryker
- Brad van Guilder, Ecology Center
- Lisa Wosniak, Michigan League of Conservation Voters Education Fund

Nurses Case Analysis:

- Mike Belliveau, Environmental Health Strategy Center
- Karen Bowman, Consultant to Washington State Nurses Association
- Charlotte Brody, Commonweal
- Rebecca Clouse, American Nurses Association
- Gary Cohen, Environmental Health Fund
- Ken Cook, Environmental Working Group
- Daryl Ditz, Center for International Environmental Law
- Sarah Doll, SAFER
- Tracey Easthope, Ecology Center (Michigan)
- Anna Gilmore Hall, Health Care Without Harm
- Janet Haebler, American Nurses Association
- Judy Huntington, Washington State Nurses Association
- Andy Igrejas, National Environmental Trust
- Diane Ives, Kendeda Foundation
- Bettie Kettell, Maine Nurses Association
- Adam Schaefer, National Caucus of Environmental Legislators
- Ted Schettler, Science and Environmental Health Network
- Laurie Valeriano, Washington Toxics Coalition
- Kristen Welker-Hood, Physicians for Social Responsibility (formerly ANA)

Maine Case Analysis:

- Mike Belliveau, Environmental Health Strategy Center
- Gary Cohen, Environmental Health Fund
- Ken Cook, Environmental Working Group
- Daryl Ditz, Center for International Environmental Law
- Sarah Doll, SAFER
- Maureen Drouin, Maine League of Conservation Voters Education Fund
- Ken Geiser, Lowell Center
- Ruth Hennig, JMF, Beldon Board
- Andy Igrejas, National Environmental Trust
- Diane Ives, Kendeda Foundation

- Bettie Kettell, Maine Nurses Association
- Hannah Pingree, Maine House of Representatives
- Sarah Standiford, Maine Women's Policy Center
- Adam Schaefer, National Caucus of Environmental Legislators
- Lael Stegall, Beldon Board, advisory board member of EHSC
- Eliza Townsend, Maine Department of Conservation (formerly Maine LCVEF)
- Laurie Valeriano, Washington Toxics Coalition

Florida/Wisconsin Case Analysis:

- Kathy Aterno, Clean Water Fund
- Spencer Black, State Representative Wisconsin's 77th Assembly District
- Denny Caneff, Wisconsin River Alliance
- Alan Farago, Consultant
- Mark Ferrullo, Environment Florida
- David Guest, Florida Earth Justice
- Linda Honold, Citizen Action
- Brian Kettenring, ACORN
- Dan Koehler, Wisconsin Environment
- Dick Mark, Buttonwood Partnership/Environmental Media Services
- Larry Marx, Donor Collaborative of Wisconsin
- Christine Neuman Ortiz, Voces de la Frontera
- Pam Porter, Consultant, P Squared Group
- Jon Richards, State Representative Wisconsin's 19th Assembly District
- Melissa Scanlan, Midwest Environmental Advocates
- Bob Schaeffer, Consultant/Center for Civic Participation
- Kerry Schumann, Wisconsin League of Conservation Voters Education Fund
- Anne Summers, Brico Fund
- Lisa Versaci, FLX Communications

APPENDIX: SURVEY MONKEY RESULTS

At the conclusion of the evaluation interviews, all participants were given a final opportunity to share additional confidential feedback via a completely anonymous on-line survey. The intent of this final survey was to ensure that people had multiple chances to offer critical feedback. Only a few people took advantage of the blind survey and the results, which are far from critical, are included below.

I. What could the Beldon Fund have done differently or better in its work?

- Stayed in business for another 10 years! Focused even more resources on building advocacy capacity at the state level. Endowed a few strong state programs as part of their exit strategy.
- Continue!
- I regret Beldon is going out of business. This will leave a significant hole in the funder community of a smart, aggressive supporter of grassroots organizing and civic engagement. If I were to recommend the one thing Beldon Fund could have done differently, I wish they had not made the decision to leave the field once they had built such great capacity and reputation. I fear the voice for grassroots organizing will be missed (in the donor community) with Beldon's absence.

2. Is there anything else you would like to share about the Beldon Fund?

- I think that focusing on key states was terrific! It allowed Beldon staff to really get to know partners and grantees in a way that many national foundations cannot or do not do.
- Beldon deserves so much credit for its pioneering work.
- Thank you for your tremendous work. Beldon approached its work with an attitude of respect and depth of knowledge (about organizing and civic engagement) I've never encountered.