How to Fund Your Monitoring and Education Efforts

Water Monitoring and Education Summit
November 18, 2009
Alyse Greenberg
The Watershed Institute
What is the Watershed Institute?

• Purpose: to strengthen and connect citizen-based watershed organizations throughout New Jersey that are engaged in protecting precious water resources and natural lands.

• Projects:
  – Small grant program
  – Workshops
  – One-on-one assistance
  – Listserv
  – Publications
  – Website
  – Idea-sharing meetings
Major Types of Funders

- Corporate
- Foundation
- Government
- Individual
Example Corporate Funders

- PSE&G
- Bristol-Myers Squibb
- Johnson & Johnson
- Banks
- Environmental Consulting Firms
- Garden Clubs
- Local Businesses
Major Types of Funding Support

- General Operating
- Capacity Building
- Project Support
- Sponsorship (corporate)
- Professional Services/In-kind (corporate/individual)
- Matching gifts (corporate/individual)
Resources for Identifying Funders

- Records of previous funders (and non-funders)
- Funding Information Center (libraries throughout NJ, NY, and PA)
- Online databases (Watershed Institute, GrantStation, Foundation Center)
- Council of New Jersey Grantmakers
- Other organizations (annual reports, websites)
- Business networking opportunities (e.g. Chamber of Commerce)
- Board member & volunteer contacts
## Area of Interest: Environment & Animals

<table>
<thead>
<tr>
<th>Air/Water Quality</th>
<th>Global Warming</th>
<th>Watershed Protection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal Welfare</td>
<td>Land Protection</td>
<td>Wetlands</td>
</tr>
<tr>
<td>Biodiversity</td>
<td>Land Use Planning</td>
<td>Wilderness</td>
</tr>
<tr>
<td>Endangered Species</td>
<td>Marine Issues</td>
<td>Wildlife Conservation</td>
</tr>
<tr>
<td>Energy</td>
<td>Natural Resources</td>
<td>Zoos</td>
</tr>
<tr>
<td>Environmental Education</td>
<td>Recycling</td>
<td>Environment/Animals</td>
</tr>
<tr>
<td>Environmental Justice</td>
<td>Toxics/Wastes</td>
<td>General</td>
</tr>
<tr>
<td>Forest Issues</td>
<td>Trails</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of support:</th>
<th></th>
</tr>
</thead>
</table>
| Advocacy        | Equipment
| Awards/Prizes   | Fellowships
| Building Funds  | For-profit organizations
| Capacity Building | General Support
| Cause-Related Marketing | Grassroots
| Challenge Grants | Individuals
| Collaborations/Coalitions | Infrastructure
| Computers/Software | In-kind
| Conferences/Seminars/Workshops | Internships
| Emergency Funds | Land/Property Acquisition
| Endowment       | Loans/PRIs

| Matching | Product Donation
| Project Planning | Project/Program Support
| Research | Residencies
| Scholarships | Seed Money
| Technical Assistance | Training Programs
| Travel Expenses |
The Bunbury Company
2 Railroad Place; Hopewell, NJ 08525
Phone: 609-333-8800
Fax: 609-333-8900
Url: http://www.bunburycompany.org/

Geographic Scope: New Jersey

Geographic Focus:
Primarily Burlington, Camden, Hunterdon, Mercer, Middlesex, and Somerset counties with an emphasis on Mercer County

Type of Organization: Foundation
Total Annual Giving: $996,000
Grant Range: $1,000 - $100,000
Average Grant: $15,000
Eligibility Requirements:
Nonprofit organizations and public institutions

Application Deadlines:
November 5, 2009 and March 9, May 4, and August 12, 2010

Areas of Interest: The Bunbury Company is a private grantmaking foundation that supports nonprofit organizations in central New Jersey. The Foundation considers applications primarily from the following counties: Burlington, Camden, Hunterdon, Mercer, Middlesex, and Somerset. Emphasis will be given to organizations located within Mercer County. The Foundation seeks to assist organizations working with programs in the following areas:

• educational programs that provide opportunities for intellectual, societal or cultural growth to youth and families;
• environmental programs that help conserve threatened farmland, habitat, or waterways, and regional planning efforts that help advance these goals;
• community building and social service programs that empower the underserved; and,
• cultural programs that promote local artistic initiatives.
Types of support include: special programs; general support; building funds; and, challenge and matching grants.

The Foundation does not provide support to/for: endowment campaigns; sporting activities, outings, or events; fraternal or religious organizations, including schools with religious affiliation; individual fellowships or scholarships; summer camps or day care facilities, unless part of a comprehensive after-care program; organizations with multiple chapters, if outside Mercer County; specific cultural performances; or publications or surveys.

Application Procedures:
Application guidelines are available on the Foundation's website listed above.

Last Updated: 9/1/2009
Foundation Center

Foundation Finder
Expanded and improved!

Foundation Finder has been redesigned to allow you to:

- Search by grantmaker name—including former, partial, and
  variant names
- Search by geography to identify grantmakers in a given city,
  county, state, or country
- Search by EIN number

With basic information on grantmakers in the U.S.—including private
community foundations, grantmaking public charities, and corporate
philanthropy programs—Foundation Finder is even more comprehensive than ever!

Tips for Using Foundation Finder

Name
Environmental Endowment for New Jersey

City

State

ZIP

EIN

Find Clear
Environmental Endowment for New Jersey, Inc.

Address and Contact Information
P.O. Box 3446, Trenton, NJ 08619-0446
  Telephone: (609) 584-1593
  Contact: Joan Burkholdt, Secy.
  Additional info: FAX: (609) 584-5341
  E-mail: info@eenj.org
  URL: www.eenj.org/

Type of Grantmaker: Independent foundation

IRS Exemption Status: 501(c)(3)

Financial Data: (yr. ended 04/30/2008)
  Total Assets: $5,734,303
  Total Giving: $223,888

EIN: 223107878

990-PF
Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

For calendar year 2007, or tax year beginning MAY 1, 2007, and ending APR 30, 2008

A Employer identification number
22-3107878

B Telephone number
(609) 584-1593

C Exemption application is pending, check here □

D 1. Foreign organizations, check here □
2. Foreign organizations meeting the 50% test, check here and attach computations □

E If private foundation status was terminated under section 507(b)(1)(A), check here □

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here □

H Check type of organization:
X Section 501(c)(3) exempt private foundation

I Fair market value of all assets at end of year (from Part II, col (e), line 16)
5,734,303

J Accounting method:
□ Cash
X Accrual

K Address change □ Name change □

L Address □

M City or town, state, and ZIP code
TRENTON, NJ 08619-0446

N OMB No. 1545-0062

Part I Analysis of Revenue and Expenses

<table>
<thead>
<tr>
<th></th>
<th>(a) Revenue and expenses per books</th>
<th>(b) Net investment income</th>
<th>(c) Adjusted net income</th>
<th>(d) Disbursements for charitable purposes (cash basis only)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Contributors, gifts, grants, etc. received</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS

TRUSTEES AND FOUNDATION MANAGERS

<table>
<thead>
<tr>
<th>NAME AND ADDRESS</th>
<th>TITLE AND COMPENSATION</th>
<th>BEN PLAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOAN BURKHALTER</td>
<td>SECRETARY</td>
<td></td>
</tr>
</tbody>
</table>
### Part XV Supplementary Information

**Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see the instructions.**

1. **Information Regarding Foundation Managers:**
   - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

   **NONE**

   - List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

   **NONE**

2. **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
   - Check here [ ] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., (see instructions) to individuals or organizations under other conditions, complete items 2a, 2b, 2c, and 2d.

   - The name, address, and telephone number of the person to whom applications should be addressed:

   **SEE STATEMENT 14**

   - The form in which applications should be submitted and information and materials they should include:

   - Any submission deadlines:

   - Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

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### Grants and Contributions Paid During the Year or Approved for Future Payment

<table>
<thead>
<tr>
<th>Recipient</th>
<th>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</th>
<th>Foundation status of recipient</th>
<th>Purpose of grant or contribution</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SEE ATTACHED SCHEDULE</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>223,888</strong></td>
</tr>
</tbody>
</table>
FORM 990-PF  GRANT APPLICATION SUBMISSION INFORMATION  PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED
JOAN BURKHOLTZ, OFFICE ADMINISTRATOR
PO BOX 3446
HAMILTON, NJ 08619-0446

TELEPHONE NUMBER
609-777-1097

FORM AND CONTENT OF APPLICATIONS
INTERESTED PARTIES SHOULD SUBMIT A BRIEF (2 PAGE) DESCRIPTION OF THE PROPOSED PROJECT AND ITS BUDGET; AN EXPANDED APPLICATION MAY THEREAFTER BE REQUESTED.

ANY SUBMISSION DEADLINES
BRIEF DESCRIPTION - DECEMBER 15 ADDITIONAL INFORMATION MAY BE REQUESTED

RESTRICTIONS AND LIMITATIONS ON AWARDS
RESEARCH, LITIGATION, AND PUBLIC EDUCATION THAT WILL PROMOTE THE CONSERVATION, PRESERVATION, AND IMPROVEMENT OF THE ENVIRONMENT IN GEOGRAPHICAL AREAS SPECIFICALLY DESIGNATED IN THE GRANTS RECEIVED.

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Individual Relationship</th>
<th>Foundation Status</th>
<th>Purpose of Grant</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Littoral Society 18 Hartshorne Dr Suite 1 Highlands, NJ 07732</td>
<td>N/A</td>
<td>Non-Profit</td>
<td>Protecting the land to protect the Bay</td>
<td>10,000</td>
</tr>
<tr>
<td>Association of New Jersey Environmental Commissions P O Box 157 Mendham, NJ 07945</td>
<td>N/A</td>
<td>Non-Profit</td>
<td>Local Action To Protect State Water</td>
<td>12,000</td>
</tr>
<tr>
<td>Camden Greenways Inc</td>
<td>N/A</td>
<td>Non-Profit</td>
<td>Camden Greenway Trail Project</td>
<td>12,000</td>
</tr>
</tbody>
</table>
**Sample Profile Form**

**The Foundation Center’s Prospect Worksheet—Institutional Funders**

**PROSPECT WORKSHEET**

<table>
<thead>
<tr>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Information</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>Contact Person</td>
</tr>
<tr>
<td>Financial Data</td>
</tr>
<tr>
<td>Total Assets</td>
</tr>
<tr>
<td>Total Grants Paid</td>
</tr>
<tr>
<td>Grant Ranges/Amount Needed</td>
</tr>
<tr>
<td>Period of Funding/Project</td>
</tr>
<tr>
<td>Is Funder a Good Match?</td>
</tr>
<tr>
<td>Subject Focus (list in order of importance)</td>
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<tr>
<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td>Geographic Limits</td>
</tr>
<tr>
<td>Type(s) of Support</td>
</tr>
<tr>
<td>Population(s) Served</td>
</tr>
<tr>
<td>Type(s) of Recipients</td>
</tr>
<tr>
<td>People (Officers, Donors, Trustees, Staff)</td>
</tr>
<tr>
<td>Application Information</td>
</tr>
<tr>
<td>Does the funder have printed guidelines/application forms?</td>
</tr>
<tr>
<td>Initial Approach (letter of inquiry, formal proposal)</td>
</tr>
<tr>
<td>Deadline(s)</td>
</tr>
<tr>
<td>Board Meeting Date(s)</td>
</tr>
<tr>
<td>Sources of Above Information</td>
</tr>
<tr>
<td>□ Annual Report -- Year: □ Requested □ Received</td>
</tr>
<tr>
<td>□ Directories/grant indexes</td>
</tr>
<tr>
<td>□ Grantmaker Web site</td>
</tr>
<tr>
<td>Notes:</td>
</tr>
<tr>
<td>Follow-up:</td>
</tr>
</tbody>
</table>
Choose Your Next Funder

• Pick a monitoring or education project your organization is working on or planning for the future
• Review the funder profiles with the project in mind
• Select the funder that is the best fit
Next Steps

- Build relationship with funder
- Apply for grants
- Track information
Building Relationships

• Review funder website to determine their preferred method of contact.
• Know one of their grantees? Reach out to them too - they can let you know if the funder is good to work with and if they think the funder would be receptive to a call.
• If you know one of their board members, call them up to find out more about the funder’s priorities.
• If the funder takes calls, call them up - let them know you are considering applying and would like to tell them a little about your organization and receive their feedback.
• Ask the funder if they’d like you to send them your newsletter and invite them to join your mailing/email list.
• Invite the funder to an event or for a tour of your watershed.
Applying for Grants

• Follow directions carefully. Don’t get disqualified before you even have a foot in the door!
• Do not wait until the last minute.
• Proofread! Have your board proofread. Ask your parents, spouse, children, neighbors to proofread.
• No jargon/shop talk!
• Contact the funder with any questions (unless they specify that they do not take calls).
• Ask the funder for feedback after they make decisions- whether they funded you or not, they will have some valuable tips for future proposals.
Tracking Information

• How to track
  – Database
  – Spreadsheet
  – Hard copy file

• What to track for all funders
  – Who you applied to and when
  – What you applied for and how much
  – Status (funded, pending review, rejected)
  – Next steps (thank you notes, report due dates, next application deadline, conversation with funder for input, etc.).
Tracking Information

• What to track for approved grants
  – All of the above, plus:
  – Letter of Inquiry and/or Proposal
  – Correspondence to/from funder
  – Financial information (contracts, invoices, financial reports, timesheets, in-kind services)
  – Project reports
  – Project products (including press hits)
Tips for Monitoring

• Look into companies who provide monitoring equipment/supplies. They may be willing to sponsor monitoring programs, donate products or provide discounts.

• Consider environmental consultants who may sponsor monitoring programs or provide in-kind services or discounts.

• Companies or universities with labs may be able to assist with chemical/waste disposal.
Tips for Education

• Don’t rule out funders who provide grants to schools. A school could apply for funds to have you work with them.

• Gain ideas through networks such as Alliance for New Jersey Environmental Education, North American Association for Environmental Education, NJ State Environmental Education Directory, etc.

• Search for funders for general education as well. They may be open to funding environmental education programs.
Resources

- Council of New Jersey Grantmakers: http://www.cnjg.org/
- Foundation Center: http://foundationcenter.org/
- GrantStation: http://www.grantstation.com/
- Funding Information Center/Cooperating Collections: http://foundationcenter.org/collections/
- Directory of Watershed Resources: http://efc.boisestate.edu/watershed/index.asp
- The Watershed Institute: http://www.thewatershedinstitute.org/
Questions?

Thank you!

609-737-3735 x27
Agreenberg@thewatershed.org