

Great Lakes United



MEMORANDUM

TO: Executive Committee Members & *Manny*
From: Karen
Date: 2/22/94
RE: Grant Status Report

Attached you will find a report detailing the status of grants, grant reports and our obligations under various grants, settlements, etc.

Regarding the grant reports. As I mentioned to you over the phone there are five grant reports that have not been filed. The Great Lakes Protection Fund should be filed this week. Tony has written it and I just need to review it and put together attachments and financial information. Reg is working on the Gund grant with help from Bruce Kershner and we expect to have that out on the 28th of February. Sean is pulling together the sections on strategic planning for the Joyce and Mott reports. I will write the remaining portions of those three reports. I hope that I can complete these reports by the end of next week. I must admit there are a lot of loose ends that needed immediate attention that have prohibited me from getting to these reports sooner.

If you have any questions about this memo please give me a call. I would suggest that we continue this type of reporting on at least a quarterly basis so that everyone knows the status of grants. An obvious additional section that is not included in this report are grants that have been submitted and are pending. If you have any suggestions regarding how you would like grant reporting to be conducted, format changes, etc., let me know.

Take care.

GRANT STATUS as of 2/22/94

Great Lakes Protection Fund -- PP791-1021 (1992-1993)

Submitted: 1991
Grant Period: February 15, 1992 - February 15, 1994
Amount Received: \$60,000 over 2 year period -- 1992-1993

Activities: Support public education on poll. prev.
1. 8 issues of the BPP
2. P2 Resource Center: accessing databases, purchasing of relevant documents, developing targeted information sheets on P2 and zero discharge.

Reporting Requirements:

Reports submitted every 6 months:

8\15\92

2\15\93

8\15\93

2\15\94

Contents:

a. narrative description of activities

b. financial report with original line-item budget

10% of grant withheld until final report received.

Status:

Reports:

8\15\92 submitted (can't find copy of report but found cover letter)

2\15\93 submitted

8\15\93 submitted

2\15\94 report - not filed

Joyce Foundation -- 3 Year Proposal (1991-1993)

Submitted: June 15, 1990
Grant Period: January 1, 1991 - December 31, 1993 ????
Award Letter: August 8, 1990
Amount received: \$195,000 over 3 years
\$60,000 each year; \$5,000/year for zero discharge task force (GLU and other organizations to come up with \$15,000 matching funds)

Activities: General Support
A. Specific areas articulated in grant as general areas of work:

- RAPs (citizen communication)
- human health (education)
- zero discharge
- other ongoing activities: advisory boards, publications, open office in Windsor

B. Further development of zero discharge alliance.

- ongoing support for z.d. task force
- Meet 4 times per year; conference calls 4 times per year; and mailings.
- kick off event and conference

Reporting Requirements:

December 1, 1990
 June 1, 1991
 December 1, 1991
 June 1, 1992
 December 1, 1992
 June 1, 1993
 December ??? award letter doesn't state that report is due, but late notice was sent by the foundation stating that report was due on 12/1/93.

Status:

12/1/90 - submitted
 6/1/91 - submitted 6/14/91
 12/1/91 - submitted 12/12/91
 6/1/92 - submitted 6/29/92
 12/1/92 - submitted 2/23/93
 6/1/93 - submitted 8/26/93
 12/1/93 - ?

Ontario Ministry of Environment and Energy -- EE93067 (1993)
 Environmental Education and Awareness Program

Submitted: March 25, 1993
 Grant Period: GLU - 6 month campaign
 Award Letter: August 10, 1993
 Amount Received: Requested: \$41,727; Received: \$10,000
 (20% withheld until the final report is received)

Activities: Printing costs associated with NAFTA campaign

- a. position paper
- b. trade information kit (fact sheets)
- c. media materials
- d. GLU newsletter
- e. action alert bulletins

Reporting Requirements:

Report submitted within three months of project completion.

Report components:

- summary of env. benefits
- specific reporting forms

Status:

Report has not been filed; activities have been completed.

Gund Foundation - #92-374 (1993)

Submitted: September 30, 1992
Grant Period: January 1, 1993 to December 31, 1993
Award Letter: December 14, 1993
Amount Received: \$30,000

Activities:

Purpose: Hire a Lake Erie Coordinator who will work on:

a. Issues

- RAPs
- establishment of Lake Erie Alliance
- wetland and coastal protection
- Basin-wide issues including water diversion, drinking water and zebra mussels

b. Member development and communications including the publication of GLU newsletter

Reporting Requirements:

Final report due 12/15/92

Status:

12/15/93 report - not filed

Laidlaw Foundation - # G93-49 Pollution Prevention & RAPS (1993)

Submitted: January 4, 1993
Grant Period: March 1, 1993 to December 31, 1993
Award Letter: 2/24/93
Amount Received: Part of larger grant for \$82,809. Requested \$20,000; received \$10,000.

Activities:

- a. Assess progress on z.d. in the AOCs
 - assessment
 - work with citizens in 10 AOCs on assessment

- survey
- b. Identify needed programs
- c. Assess roles of government agencies.
- d. Build citizens' consensus and strategy
 - workshop
 - ongoing communication structure

Reporting Requirements:

Progress report due December 31, 1993

Status:

Submitted application to Environment Canada, EPA and the Great Lakes Protection Fund. No additional funding for this project could be secured. Presently resubmitting revised proposal for smaller workplan to Laidlaw for review at their March Board Meeting.

Joyce Foundation - 1.5 year proposal (1993-1994)

Submitted: April 14, 1993
 Grant Period: August 1, 1993 - July 31, 1994
 Award Letter: August 2, 1993
 Amount Received: Total of \$75,000:
 \$60,000 general support funding
 \$15,000 strategic planning

Activities:

- A. General Support
 1. Env. sustainable AOCs
 2. Increase effectiveness and profile of GLU in Canada
 3. Advocate env. agenda at IJC
 4. Increase sustainability of GLU
- B. Develop strategic plan

Reporting Requirements:

January 31, 1994
 August 31, 1994
 Informal updates after each of the strategic planning meetings.
 Report contents to include:
 - discussion of efforts to improve fiscal management (staffing levels, accounting procedures, and income generation)

Status:

1/31/94 Report - not filed

Charles Stewart Mott Foundation - #93-152 (1993-1994)

Submitted: April 30, 1993 with response to questions
6/15/93
Grant Period: July 1, 1993 to December 31, 1994
Award Letter: August 19, 1993
Amount Received: \$75,000
\$25,000 (1993); \$50,000 (1994)
(believe that \$5,000 in 1993 is to go to
strategic planning and \$10,000 in 1994)

Activities:

- a. helping build environmentally sustainable communities within AOCs
- b. increasing the effectiveness, profile and presence of Great Lakes United in Canada
- c. Advocating an environmental agenda at the IJC meeting
- d. increasing the sustainability of GLU

Reporting Requirements:

2/1/94 for period ended 12/31/93
8/1/94 for period ended 6/30/94
2/1/95 for period ended 12/31/94

Contents:

- narrative summary of major activities
- financial statements that include reporting period

Status:

2/1/94 report - not filed

Gund Foundation - 93-389 (1994)

Submitted: September 29, 1993
Grant Period: January 1, 1994 to December 31, 1994
Award Letter: December 21, 1993
Amount Received: Requested: \$46,943; Received \$35,000
(\$24,339 - production and distribution of
GLU news; \$22,604 fund the BPP)
(\$24,339 - production & distribution of GLU
news; \$10,661 - BPP)

Activities:

Purpose: continue production and distribution of the GLU quarterly newsletter and remaining funds go to BPP.

- a. GLU newsletter and BPP
- b. Organize the Ontario Lake Erie shore for the Alliance

Reporting Requirements:

Final Report due 2/15/95
Specific reporting forms

Status:

Settlement Money through Atlantic States Legal Foundation - (1993-1994)

Submitted: December, 1994; resubmitted with changes in 1/94
Grant Period: January 1994 to October 1995
Award Letter: Pending
Amount Received: Two settlements: \$11,000 received in December; \$25,600 pending

Activities: Purpose: Assist Rochester PAC to incorporate P2 in Stage 2.
- organize P2 workshop
- prepare summary report from workshop
- work with PAC to assess existing commitments
- article in BPP (highlight)
- presentation on Rochester stuff at 1995 IJC meeting

Reporting Requirements:

None specified.

Recommendations on reporting:

1. Narrative report with relevant attachments sent to ASLF, the companies entering the settlement agreement, and Allan, Lippes and Shonn.
2. Treated as restricted fund with separate accounting. Financial statement sent with final report.

Status:

Public Health Institute - Labor & Environment Trainings (1994)

Submitted: November-December 1994
Grant Period: 1994
Award Letter:
Amount Received: PHI has \$3,000 for 1994 to contract with GLU to organize a workshop to train labor and environmentalists to talk to each other [amount would be either:\$3,000 per workshop if we organize entirely (15 labour and 15 environmentalists); \$1,500 otherwise]. All

expenses for the workshop would be paid by PHI. This is a payment for organizing the workshop.

Activities:

Organize labor and environment training workshop. Institute provides the curriculum and the trainers.
- Figure out what we want the training to be.
- Identify and invite participants

Reporting Requirements: ?

Status:

Laidlaw Foundation - Grant to CELA for NAFTA Trade Campaign (1993)

This is a grant that CELA is actually holding in trust. Some expenses will be paid to GLU and some to CELA -- unspecified at this point.

Submitted: Revised outline submitted 9/24/93
Grant Period: Assume September 31, 1993 to August 1, 1994
Award Letter: We don't have a copy.
Amount Received: Requested: \$18,925; Received: \$10,000
Laidlaw will not fund activities that were completed prior to submittal of the grant.

Activities:

- a. Revision and rewrite of background paper
- b. Final edit and copying of videotape from Chicago
- c. NAFTA fact sheets (8 topics)
- d. Distribution of information kits.
- e. Meeting of NAFTA steering committee
- f. Workshop in Canada

Reporting Requirements:

Assume: Final progress report at the end of the project