Inland Empire Community Foundation
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2024 S.L. Gimbel Foundation Grant Application

Internal Use Only:
Grant: ______________

Organization / Agency Information

1)Organization/Agency Name: **The Archaeological Conservancy**		
2)Physical Address: **1717 Girard Blvd. NE**		*City/State/Zip* **Albuquerque, NM 87106**
3)Mailing Address: **1717 Girard Blvd. NE**		*City/State/Zip* **Albuquerque, NM 87106**
4)CEO or Director: **Anne Lowe**		*Title:* **President**
5)Phone: **(505) 266-1540**	*6)Fax:*	*7)Email:* **anne@thearchcons.org**
8)Contact Person: **Sarah Webber**		*Title:* **Special Projects Director**
9)Phone: **(505) 266-1540**	*10)Fax:*	*11)Email:* **sarah@thearchcons.org**
12)Web Site Address: **www.thearchcons.org**		*13)Tax ID:* **95-3403273**

Program / Grant Information

Interest Area:

14)Program/Project Name: **McKeown Archaeological Project**			*15)Amount of Grant Requested:* **$100,000**
16)Total Organization Budget: **$4,933,000**	*17)Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):* **78%**	*18)Per 990, Percentage of Management & General Expenses Only (Column C / Column A x 100):* **9%**	*19)Per 990, Percentage of Management & General Expenses and Fundraising (Column C+D / Column A x 100):* **22%**
20)Purpose of Grant Request (one sentence): **The Archaeological Conservancy is requesting funding from the S.L. Gimbel Foundation for the acquisition and preservation of McKeown archaeological site in Whiteside County, Illinois.**			
21)Program Start Date (Month and Year): **January 9, 2025**		*22)Program End Date (Month and Year):* **January 9, 2026**	
23)Gimbel Grants Received: List Year(s) and Award Amount(s) **2013 - $25,000 for Redtfelt Mound Archaeological Project**			

Signatures

24)Board President / Chair: (Print name and Title) **Vin Steponaitis, Board Chairman**	*Signature:* Vin Steponaitis	*Date:* **10/9/2024**
25)Executive Director/President: (Print name and Title) **Anne Lowe, President**	*Signature:* Anne Lowe	*Date:* **10/9/2024**

2024 S.L. Gimbel Foundation Fund APPLICATION Narrative

Please provide the following information by answering **ALL** questions (I to IV), **12 Font, One Inch Margins.** Use the format below (I to IV). Type your complete answers to the question directly below the question. Please do not delete the questions/instructions/examples and provide clear, specific, and concise answers.

SEE ATTACHED

I. Organization Background

A) State the history, mission and/or purpose of your organization.

B) How long has the organization been providing programs and services to the community?

C) What are some of your past organizational accomplishments (last three years)?

II. Project Information:

A) **Statement of Need**

Specify the community need(s) you want to address and are seeking funds for.
Include demographics, geographic characteristics of the area or community to be served, community conditions and income level. Include relevant statistics.

B) Project Description

1. Describe your project. How does your project meet the community need?
2. What is unique and innovative about this project?

C) Project Goal, Objective, Activities and Expected Outcome

1. **Note: Objective, Outcome and Evaluation must all be based on the SAME QUANTIFIABLE CRITERIA (for example, "number served, or acres improved"). This quantifiable criteria should refer to the grant amount you are requesting from the Gimbel Foundation only and not the total program.**

State ONE GOAL, ONE OBJECTIVE, ONE OUTCOME. USE NUMBERS AND DO NOT USE PERCENTAGES.

2. **State ONE project goal. The Goal should be an aspirational statement, a broad statement of purpose for the project.**
3. **State One Objective**. The Objective should be specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. **Specify the activities** you will undertake to meet the objective and number of participants for each activity.
4. **State One Outcome.** An outcome is the individual, organizational or community-level change that can reasonably occur during the grant period as a result of the proposed activities or services. What is the key anticipated outcome of the project and impact on participants? State in a quantifiable and verifiable term.
5. **Evaluation:** How will progress towards the objective (per above) be tracked and outcome measured?

Provide specific information on how many individuals will be evaluated (should be the same number as in the objective and outcome), how you will collect relevant data and statistics that meet your objective and validate your expected outcome, in a quantifiable manner, as you describe your evaluation process.

BELOW IS AN EXAMPLE OF GOAL, OBJECTIVE, OUTCOME AND EVALUATION: Objective, Outcome and Evaluation should align and should be written in a linear format, using actual numbers, and data that are quantifiable and verifiable. Do not use percentages)

GOAL: Enhance and supplement the diet of food insecure families and children in Mariposa County with healthy, fresh food each month to improve their health and wellbeing.

OBJECTIVE: Distribute at least **500,000 meals of healthy, fresh food to 7,000 unduplicated residents in need**.

ACTIVITIES:

1) Purchase fresh produce and other food items not provided by existing local farm and USDA sources to support 7,000 unduplicated food distribution participants.
2) Continue to promote monthly food distribution program through community partners across the county.
3) Input monthly food distribution data into USDA database system.

OUTCOME: We expect to **provide 500,000 meals to 7,000 unduplicated food insecure county residents**, increasing their healthy food intake and habits.

EVALUATION: Using the USDA's tracking system we will generate reports on the number of food insecure children and families we have served. We will track our role in **providing 500,000 meals feeding 7,000 unduplicated food insecure individuals** and account for additional success or lower numbers of individuals served.

WRITE YOUR RESPONSES using the following format for your goal, objective, respective activities and expected outcome:

GOAL:
OBJECTIVE:
ACTIVITIES:
OUTCOME:
EVALUATION:

D) Timeline

Provide a timeline for implementing the project. The start date and end date should be the same dates on the cover page. Start date should be 3 months AFTER the submission deadline.
The project start date is:
The project end date is:
Include timeframes for specific activities, as appropriate.

E) Target Population

1. Who will this grant serve?
2. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors.

F) Community Partners

1. How does this program relate to other existing projects in the community?
2. Who are your key community partners? Provide a brief description of each key partner and their role(s) in this program.
3. How are you utilizing volunteers?

G) Use of Grant Funds

How will you use the grant funds? This answer should align with the specific activities previously outlined in C) Project Goal, Objectives, Activities and Expected Outcomes

III. Project Future

A) Sustainability

Explain how you will support this project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

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IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications

A) Governance

1. Describe your board of directors and the role it plays in the organization.
2. What committees exist within your board of directors?
3. How does the board of directors make decisions?

B) Management

1. Describe the qualifications of key personnel/staff responsible for the project.
2. **What is the CEO/President/Executive Director Salary?**

V. Project Budget and Narrative (Do not delete these instructions on your completed form and use this form).

A) **Budget Table**: Provide a detailed line-item budget for your **entire** program by completing the table below. Note that if funded, this is the budget that you will have to refer to in the Evaluation (Final) Report. A breakdown of specific line item requests and attendant costs should include:

1) Line item requests for materials, supplies, equipment and others:

a. Identify and list the type of materials, supplies, equipment, etc.

b. Specify the unit cost, number of units, and total cost

c. Use a formula/equation as applicable. (i.e. 40 books @ $100 each = $4000)

2) Line item requests for staff compensation, benefits: **Do not use FTE percentages**. a. Identify the position; for each position request, **specify the hourly rate and the number of hours** (i.e. $20/hr x 20 hours/week x 20 weeks = $8,000)

b. For benefits, provide the formula and calculation (i.e. $8,000 x 25% = $2,000)

3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above: Provide rate of pay per hour and number of hours.

4) The Gimbel Foundation **does not fund indirect costs.**

Line Item Request	**Line Item Explanation**	**Support From Your Agency**	**Support From Other Funders**	**Requested Amount From Gimbel**	**Line Item Total of Project**
Acquisition of McKeown site	$100,000 = 10 acres @ $10,000/acre.	$0	$0	$100,000	$100,000
Closing costs with McKeown site acquisition	$1,500 - $500 for title insurance, $1,000 for misc. fees	$1,500	$0	$0	$1,500
Management Plan	$680 – cost of Midwest Regional Director writing plan $34/hour @ 20 hours = $680	$680	$0	$0	$680
Stewardship Fund	$5,000 – For future maintenance of the site	$0	$5,000	$0	$5,000
TOTALS:		$2,180	$5,000	$100,000	$107,180

B) **Narrative:** The budget narrative is the justification of “how” and/or “why” a line item helps to meet the program deliverables. Provide a description for each line item. Each line item must have a narrative. Explain how the line item relates to the program. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Program Budget and Budget Narrative

The acquisition cost of the McKeown site - 10 acres @ $10,000/acre = $100,000.

2. Closing costs for acquisition of McKeown site - $500 for title insurance + $1,000 for miscellaneous fees - $1,500.

3. Management plan for site maintenance and education – Midwest Regional Director (pending hiring position) - $34/hour x 20 hours = $680.

4. Stewardship fund – will help pay for future site costs like fencing, tree trimming or removal (if needed), etc. - $5,000.

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VI. Sources of Funding: Please list your current sources of funding and amounts.

Secured/Awarded

Name of Funder: Foundation, Corporation, Government, Individual donors, In-Kind, Other (specify)	Amount

Pending

Name of Funder: Foundation, Corporation, Government, Individual donors, Other (specify)	Amount	Decision Date
Membership donations	$5,000	12/15/20024

Diversity of Funding Sources: A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

Funding Source	Amount	% of Total Revenue	Funding Source	Amount	% of Total Revenue
Contributions and Grants	$2,359,825	45%	Acquistion Funds	$1,095,000	21%
Foundation Grants	$486,900	9%	*American Archaeology*	$5,000	.09%
Misc.	$115,796.61	2%	Tour Income	$550,000	10%
Government Funding	$302,753	6%	Interest & Dividend Income	$360,000	7%

Notes:

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VII. Financial Analysis

Agency Name: The Archaeological Conservancy
Most Current Fiscal Year (Dates): From 08/01/2024 **To:** 07/31/2025

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization.** Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures**!

Form 990, Part IX: Statement of Functional Expenses
(This should be your recently filed Form 990 and should not be more than 2 years old)

1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
3,436,109	2,678,821	314,731	442,557

2) Calculate the percentages of Columns B, C, and D, over A (per totals above)

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	78%	9%	13%

3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)

Percentage of Organization's Current Total Budget used for Administration **$345,000**	Column C, Management & general expenses per 990 above **$314,731**	**Differential 10%**

If the differential is above (+) or below **(-) 10%**, provide an explanation:

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Quick Ratio: Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

Cash	+ Accounts Receivables	/Current Liabilities	= Quick Ratio
4,769,611	289,478	1,008,488	4.18

Excess or Deficit for the Year:

Excess or (Deficit) Most recent fiscal year end $90,975	Excess or (Deficit) Prior fiscal year end $30,675

Notes:

VIII. EMAIL TWO PDF files to Gimbel@iegives.org

A. One PDF file of the following, #1 to #5 **B. Second PDF file of the following, #6 & #7**

#1	Completed Grant Application Form (cover sheet, narrative), budget page and budget narrative (see sample) and sources of funding, financial analysis page	#6	A copy of your most recent year-end financial statements (audited)
#2	Your current operating budget and the previous year's actual expenses (see sample Budget Comparison)	#7	A copy of your most recent 990. **Please make sure that the Form 990 you submit is no more than two (2) years old.**
#3	Part IX **only** of the 990 form, Statement of Functional Expenses (one page). **Please make sure that the Form 990 you submit is no more than two (2) years old.**		
#4	For past grantees, a copy of your most recent final report.		
#5	A copy of your current 501(c)(3) letter from the IRS		

SAMPLE Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
Income	**2024___**	**2025____**	
Individual Contributions	-	-	-
Corporate Contributions	-	-	-
Foundation Grants	-	-	-
Government Contributions	-	-	-
Other Earned Income	-	-	-
Other Unearned Income	-	-	-
Interest & Dividend Income	-	-	-
Total Income	**-**	**-**	**-**
Expenditures			
Personnel			
Salary CEO – Required	-	-	-
Staff Salary (total)	-	-	-
Payroll Taxes	-	-	-
Insurance - Workers' Comp	-	-	-
Insurance - Health	-	-	-
Payroll Services	-	-	-
Retirement	-	-	-
Total Personnel	**-**	**-**	**-**
General Program/Administrative			
Bank/Investment Fee	-	-	-
Publications	-	-	-
Conferences & Meetings	-	-	-
Mileage	-	-	-
Audit & Accounting	-	-	-
Program Consultants	-	-	-
Insurance Expense	-	-	-
Telephone Expense - Land Lines	-	-	-
DSL & Internet	-	-	-
Website	-	-	-
Office Supplies	-	-	-
Postage & Delivery	-	-	-
Printing & Copying	-	-	-
Miscellaneous	-	-	-
Total General Program/Administrative	**-**	**-**	**-**
Total Expenditures	**-**	**-**	**-**
Revenue Less Expense	**-**	**-**	**-**

SAMPLE Project Budget and Budget Narrative

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From TCF	Line Item Total of Project
Personnel: Project Coordinator	10 hours/week x $20/hour x 40 weeks = $8,000			$ 8,000	$ 8,000
Meetings	10 meetings x $200/meeting for food and drinks = $2,000		$1,000	$ 1,000	$ 2,000
Training and Education: Honoraria-trainers	10 trainers x $200/trainer = $2,000			$ 2,000	$ 2,000
Materials and Supplies	$40/student x 40 students = $1,600	$ 600		$ 1,000	$ 1,600
Workbooks	$30 each x 40 students = $1,200	$ 200		$ 1,000	$ 1,200
Facility Cost	$300/meeting x 10 meetings = $3,000			$ 3,000	$ 3,000
Grant awards		$5,000	$5,000	$10,000	$20,000
Youth Recognition Event: Food	$10/person x 100 people = $1,000			$ 1,000	$ 1,000
TOTALS:		$5,800	$ 6,000	$27,000	$38,800

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Coordinate all activities of the Youth Program such as setting meeting schedules, contacting students, preparing materials for meetings, scheduling trainers, etc.
10hrs/week x $20/hr. x 40 weeks = $8,000

2. Meetings: 10 meetings x $200/meeting for food, drinks, snacks. There are 40 students per meeting. Cost per student is $5 x 40 students = $2,000
3. Training and Education: Honoraria for 10 trainers/presenters x $200/trainer = $2,000.
4. Materials & Supplies - paper, binders, pens, etc. for meetings, activities, events.
   40 students x $40 per student = $1,600.
5. Workbooks: Leadership training workbooks costs $30 each x 40 students = $1,200
6. Facility cost – Room cost at a nonprofit agency is $100/hour x 3 hours per meeting x 10 meetings = $3,000
7. Grantmaking – Grant awards to nonprofit youth agencies. Maximum $2500/agency x 8 = $20,000
8. Youth Recognition Event – end of the year event for students and grantees.
   100 attendees x $10/person = $1,000

2024 S.L. Gimbel Foundation Fund APPLICATION Narrative

I. Organization Background
A) State the history, mission and/or purpose of your organization.

The Archaeological Conservancy was established in 1980 to preserve and protect the nation's most important remaining archaeological sites. Usually, permanent preservation is achieved by the acquisition of the land on which these irreplaceable sites rest.

Founded by concerned laypeople, conservationists, and archaeologists, the Conservancy has sought to permanently preserve the remains of past civilizations for future generations to study and enjoy. Preserves include the ruins of prehistoric Native Americans in the United States dating from as early as 10,000 B.C.E as well as the sites of historic settlements, forts, and churches as late as the 19th century. We are the only national nonprofit organization that identifies and permanently preserves archaeological sites throughout the nation.

As an extension of the Conservancy's preservation efforts, we publish *American Archaeology*, a nationally distributed quarterly magazine that gives members up-to-date information about the Conservancy's latest preservation efforts and educates the public about the most recent research in American archaeology. The Conservancy firmly believes that public education about the importance of protecting archaeological sites is essential in order to stem the rising tide of site destruction in America.

B) How long has the organization been providing programs and services to the community?

The Archeological Conservancy has been acquiring and preserving archaeological sites around the nation for 44 years. We are building a national system of archaeological preserves to ensure the survival of our irreplaceable cultural heritage. When a ruin is destroyed by looters, or leveled for a shopping center, precious information is lost. By permanently preserving endangered ruins, we assure they will be here for future generations to study and enjoy.

In addition to the Conservancy's preservation efforts, we educate the public about the recent developments, news, and research in the field of archaeology. We firmly believe that public education about the importance of protecting archaeological sits is essential to stem the rising tide of site destruction in America. Information about our projects is disseminated to the public through press releases, public venues, lectures, social media posts, and our quarterly magazine, *American Archaeology.* The Conservancy also conducts public tour programs on many of our preserves. The general public, various interest groups, local school children, and college students all have access to the sites by appointment for educational tours that are led by trained volunteers.

C) What are some of your past organizational accomplishments (last three years)?

For the past three years, the Conservancy has continued working towards the mission of our organization. We have acquired 36 sites all over the nation and have several projects pending. The Conservancy has expanded our educational program to include virtual site visit videos that are available on our website and YouTube channel. These videos include drone footage, archival photos, and interviews with experts, Conservancy staff, and site volunteers.

Our co-founder and president Mark Michel, retired in July of 2024 after 44 years of leading the Conservancy. The Board of Director's hired Anne Lowe as the new president, who has over 20 years of experience with preservation work.

II. Project Information:

A) **<u>Statement of Need</u>**

Specify the community need(s) you want to address and are seeking funds for.

Include demographics, geographic characteristics of the area or community to be served, community conditions and income level. Include relevant statistics.

The archaeological record is shrinking, and irreplaceable cultural material is destroyed every day. A single archaeological site may provide insight into a culture's art, language, social organization, and other features of the human experience. The destruction of cultural material creates gaps in our cultural narrative and limits understanding of our nation's rich past. With the archaeological record dwindling at a rapid rate, it has become even more crucial to preserve archaeological sites of posterity.

In many countries, including England, Italy, Mexico, and Egypt, archaeological remains are safeguarded by rigid laws. But in the United States, our concept of private property grants to landowners the right to treat property with prehistoric and historic remains as they see fit. Although our ancient sites can provide knowledge and enrichment for people today and in the future, the archaeological heritage of the United States continues to disappear at an alarming rate because of urban development, modern agricultural practices, and organized commercial looting.

For example, in the 1840's, the Bureau of Ethnology of the Smithsonian Institution surveyed the ancient mound builder sites of the Ohio and Mississippi River Valleys. During the survey, investigators recorded over 20,000 mound sites. Today, archaeologists estimate that less than 1,000 of those sites remain. In some cases, all that could have been known about a culture whose name and customs have been long forgotten was lost when a particular site was destroyed. A lost culture will always remain as a gap in our knowledge of America's prehistory.

By preserving endangered sites, the Conservancy is contributing to the further study of prehistoric and historic cultures. Although the Conservancy does not undertake any excavations, we enable researchers to analyze cultural remains under controlled circumstances. Acquisition of the archaeological site is the first step in sequence of activities of the preservation process. Acquiring the site protects the irreplaceable cultural material in its original state, or *in situ*. Like a national, decentralized archaeology museum, the Conservancy already holds the largest nongovernmental collection of prehistoric artifacts in the United States. But unlike at conventional museums, this vast collection is maintained in its context in the ground.

B) Project Description

1. Describe your project. How does your project meet the community need?

The McKeown Archaeological Project will acquire and permanently preserve a significant site located in Whiteside County, Illinois. The site was inhabited by the Langford culture, who lived in northern Illinois from 1200-1500 C.E. This group lived in substantial villages with associated burial mounds, as well as smaller, seasonal encampments to utilize specific resources.

The parcel that contains the site is a woodlot that may have never been disturbed due to the size of the trees, carpet of native woodland plants, and the intact nature of the mound and possible house depressions from the ancient Native American village. The site holds a plethora of artifacts surfacing from the ground, a testament to the archaeological richness of the preserve. Experts have noted that it is highly likely that the site is a substantial Langford village centered around a central plaza and burial ground.

Preservation of the McKeown site provides the local community with the assurance that our shared history will be protected. Once a significant archaeological site has been disturbed, the context of the site can never be reconstructed and the information that the site contained is lost forever. When a significant archaeological site is destroyed, we lose valuable information about America's past peoples and a portion of our cultural heritage. In order to combat these challenges, the Conservancy will continue actively preserving endangered archaeological sites like McKeown.

2. What is unique and innovative about this project?

The McKeown Archaeological Project is important and unique for a variety of reasons. An archaeological site in such an excellent state of preservation, like this, is exceedingly rare in this country. Although the Langford people occupied a large area and were a critical part of the Native American history in the region, virtually all of their large, mounded villages have been heavily disturbed or completely destroyed by intensive agriculture, gravel quarrying, and urban development. This unfortunate loss of cultural heritage makes interpretation of this time period fraught with difficulties brought on by the absence of such important sites. Given the uniqueness of this extraordinary site, there is great research potential which will increase our understanding of the Langford people. The combination of being a rare site type that is remarkably preserved makes the McKeown property one of the most significant archaeological sites in need of preservation in the state of Illinois.

C) Project Goal, Objective, Activities and Expected Outcome

1.Note: Objective, Outcome and Evaluation must all be based on the SAME QUANTIFIABLE CRITERIA (for example, "number served, or acres improved"). This quantifiable criteria should refer to the grant amount you are requesting from the Gimbel Foundation only and not the total program.

State ONE GOAL, ONE OBJECTIVE, ONE OUTCOME. USE NUMBERS AND DO NOT USE PERCENTAGES.

1. **State ONE project goal. The Goal should be an aspirational statement, a broad statement of purpose for the project.**
2. **State One Objective**. The Objective should be specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. **Specify the activities** you will undertake to meet the objective and number of participants for each activity.
3. **State One Outcome.** An outcome is the individual, organizational or community-level change that can reasonably occur during the grant period as a result of the proposed activities or services. What is the key anticipated outcome of the project and impact on participants? State in a quantifiable and verifiable term.
4. **Evaluation:** How will progress towards the objective (per above) be tracked and outcome measured?

   Provide specific information on how many individuals will be evaluated (should be the same number as in the objective and outcome), how you will collect relevant data and statistics that meet your objective and validate your expected outcome, in a quantifiable manner, as you describe your evaluation process.

GOAL: The Archaeological Conservancy's primary goal is to permanently preserve significant archaeological sites from major cultures around the United States.

OBJECTIVE: Acquire and permanently preserve the McKeown archaeological site located in Whiteside County, Illinois. The Conservancy would own 10-acres and establish it as a permanent archaeological research and educational preserve.

ACTIVITIES:

1) The Conservancy will acquire the 10-acre McKeown archaeological site. This parcel contains the best-preserved portion of the site.
2) The McKeown site's cultural material will be protected and preserved as an educational archaeological preserve.
3) A management and educational plan will be developed for the site.

OUTCOME: We expect to acquire the McKeown archaeological site and preserve it for posterity.

EVALUATION: The Conservancy will acquire and preserve 10-acres of the McKeown archaeological site. A 2-acre road parcel will be donated by the current owners to ensure access to the site. A management and educational plan will be developed with Conservancy staff and local experts. The Conservancy will measure the site's impact on the public by tracking the number of tours and visitors to the site.

D) Timeline

Provide a timeline for implementing the project. The start date and end date should be the same dates on the cover page. Start date should be 3 months AFTER the submission deadline.

The project start date is: January 9, 2025
The project end date is: January 9, 2026
Include timeframes for specific activities, as appropriate.

The McKeown Archaeological Project will begin on January 9, 2025. The Conservancy plans to acquire the site on or closely after this date. We will then access the wooded area of the parcel to determine what trees need to be removed and if there are any other issues. Using the stewardship funds, the Conservancy will fence the property and install "No Trespassing" signs to ensure the preserve is adequately protected.

E) Target Population

1. Who will this grant serve?
2. How many people will be impacted? Provide a breakdown: Number of Children, Youth, Adults, Seniors.

The McKeown Archaeological Project will benefit all Americans, particularly the residents of Illinois.

F) Community Partners

1. How does this program relate to other existing projects in the community?

The Archaeological Conservancy is the only national nonprofit organization that identifies, acquires, and preserves the most significant remaining archaeological sites in the country. We work closely with the archaeological community and with state and federal government agencies to identify the sites most in need of preservation. Each state historic preservation officer is asked to provide a list of the most important sites in their respective areas. From these lists and other sources, the Conservancy compiles a master list of the most important sites in the U.S. and then attempts to acquire them one by one.

2. Who are your key community partners? Provide a brief description of each key partner and their role(s) in this program.

The current owners of the property have preserved the land and the cultural material that it contains for several years. The high-level preservation of the site is due in large part to their efforts. It is evidence that communities around the United States are concerned about preserving their past and protecting the cultural heritage that bind us all.

3. How are you utilizing volunteers?

Volunteers will play an important role in the long-term preservation of the McKeown site. This includes recruiting local site stewards to monitor the preserve and protect it from vandalism and unauthorized visits. Volunteers can also be trained as docents to lead public tours and be our primary local representative and contact. The Archaeological Conservancy will train all volunteers.

G) <u>Use of Grant Funds</u>
How will you use the grant funds? This answer should align with the specific activities previously outlined in C) <u>Project Goal, Objectives, Activities and Expected Outcomes</u>

The Archaeological Conservancy will use all grant funds from the S.L. Gimbel Foundation for the acquisition of the McKeown archaeological site. This will permanently protect the significant site for posterity.

III. Project Future

A) <u>Sustainability</u>

Explain how you will support this project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

The Conservancy adheres to the principles of "conservation archaeology." This means that excavation and analysis by archaeologists is permitted, but a portion of the site must always remain unexcavated. The reason for this is simple – the science of archaeology is always advancing. Investigations 100 years from now will yield much more information that those of today, provided that there is raw data left to be examined and studied. The Conservancy does not undertake any archaeological research itself. Instead, it permits qualified institutions to conduct research on Conservancy sites.

Once a site is acquired by the Conservancy, a master plan is developed for its management. The plan will follow the guidelines of conservation archaeology and the Conservancy's general management plan adopted by our Board of Directors. The plan will be developed by a management committee comprised of a representative from the Conservancy, the state archaeologist, Native American representatives, local preservation partners, interested professionals and members of the community. The plan will address security, maintenance, and wildlife management, as well as public and professional access.

The stewardship fund will address all immediate maintenance concerns for the McKeown site, and any future issues that arise, will be covered by the Conservancy's general fund.
This fund is unrestricted and is used for the operations of the Conservancy, including maintenance issues on our sites. Funding comes from foundation grants, private donations, and memberships.

IV. Governance, Executive Leadership and Key Personnel/Staff Qualifications

A) <u>Governance</u>

1. Describe your board of directors and the role it plays in the organization.

The Conservancy's Board of Directors includes archaeologists, educators, Conservancy members, and Native Americans. The Board currently has nine members but can consist of between five and twenty-five members. They oversee all Conservancy activities and makes all major organizational decisions. The Board meet in-person twice a year and discuss the business and issues that face the Conservancy.

2.What committees exist within your board of directors?

The current committees are Finance, Governance, Archaeological Affairs, and Executive.

3. How does the board of directors make decisions?

The Directors are elected at each annual meeting and hold office for one year until their respective successors are elected. They decide through a majority vote which projects are pursued, suggest events, and give guidance on fundraising.

B) **Management**
1. Describe the qualifications of key personnel/staff responsible for the project.

Anne Lowe is the President & CEO of The Archaeological Conservancy and an experienced land and water conservation expert with over 25 years of direct conservation projects, initiatives, and partnerships in the nonprofit and government sectors across the United States and Canada. She holds an Executive Master of Public Administration (MPA) from the University of Colorado, as well as a Bachelor of Arts in Biology and Bachelor of Music in Piano Performance from Alma College, a graduate certificate in GIS from Cleveland State University, and a certificate in Nonprofit Management from Duke University.

The Conservancy is in the process of hiring a Midwest Regional Director, who will have primary responsibility for the McKeown site. We expect to have a new director by the end of November.

2. What is the CEO/President/Executive Director Salary?

The salary of the president of The Archaeological Conservancy is $170,000.

The Archaeological Conservancy Budget Comparison

	Actuals Most Recently Completed Year	Budget Projections Current Year	Variance
Income	**2024**	**2025**	
Individual Contributions	$2,359,825.00	$2,329,025.00	-30,800
Foundation Grants	$486,900.00	$500,000.00	13,100
Government Contributions	302,753	30,975	-271,778
Misc.	115,796.61	93,975	-21,821.61
Acquisition Funds	1,095,000	1,200,000	105,000
American Archaeology Magazine	$5,000	$5,000	0
Tour Income	$550,000	$500,000	-50,000
Interest & Dividend Income	$360,000.00	$365,000.00	5,000
Total Income	**5,275,275.00**	**5,023,975**	**-251,299.60**
Expenditures			
Personnel			
Salary CEO – Required	186,575	170,000	($16,575)
Staff Salary and benefits (total)	$1,613,425.00	$1,480,000.00	-133,425
Payroll Taxes	-	-	-
Insurance - Workers' Comp	-	-	-
Insurance - Health	-	-	-
Payroll Services	-	-	-
Retirement	-	-	-
Total Personnel	**$1,800,000**	**$1,650,000**	**($150,000)**
General Program/Administrative			
Building rent/mortgage	$249,600	$255,000	$5,400
Publications - *American Archaeology* maş	215,000	240,000	$25,000
Tour expenses	$450,000	$425,000	-25,000
Fundraising activities	$595,000	$598,000	$3,000
Audit & Accounting/Legal Services	$90,000	$90,000	0
Program Consultants	0	$25,000	$25,000
Travel/Lodging	$60,000	$50,000	($10,000)
Telephone Expense - Land Lines	-	-	-
DSL & Internet	-	-	-
Website	-	-	-
Office Supplies	-	-	-
Postage & Delivery	-	-	-
Printing & Copying	-	-	-
Land Purchases - Program Expense	$1,785,000	$1,600,000	($185,000)
al General Program/Administrative	**$3,444,600**	**$3,283,000**	**($161,600)**
Total Expenditures	**$5,244,600**	**$4,933,000**	**($311,600)**
Revenue Less Expense	**$30,675**	**$90,975**	**$60,300**

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	536,038	285,961	176,583	73,494
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	962,258	810,331	35,637	116,290
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	42,611	37,114	686	4,811
9 Other employee benefits	53,744	44,137	3,276	6,331
10 Payroll taxes	102,953	78,684	11,296	12,973
11 Fees for services (nonemployees):				
a Management				
b Legal	3,206		3,206	
c Accounting	33,699		33,699	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	7,049		7,049	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	8,221		8,221	
12 Advertising and promotion				
13 Office expenses	769,819	583,220	3,262	183,337
14 Information technology				
15 Royalties				
16 Occupancy	5,654	5,427	170	57
17 Travel	40,987	31,150	4,919	4,918
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	14,744		14,744	
20 Interest	15,045	15,045		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	8,017	6,093	962	962
23 Insurance	27,555	15,156	11,021	1,378
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a SEMINARS	344,998	344,998		
b MAGAZINE PUBLISHING	245,676	221,108		24,568
c MAINTENANCE - SITES	118,231	118,231		
d PROPERTY TAXES - SITES	82,166	82,166		
e All other expenses	13,438			13,438
25 **Total functional expenses.** Add lines 1 through 24e	3,436,109	2,678,821	314,731	442,557
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☒ if following SOP 98-2 (ASC 958-720)	661,063	478,814		182,249

Describe the project's key outcomes and results based on your goals and objectives. Provide the number of clients served and other relevant statistics.
The Conservancy's objectives for the Redtfeldt Mound Archaeological Project were: acquisition, preservation, and education/research at the site. The Conservancy has acquired, stabilized, and fenced the site. Site stewards are currently monitoring the site for any signs of looting or destruction. The volunteer stewards will also be trained as docents to lead public tours and be the Conservancy's primary local representative and contact. Conservancy project benefit all Americans and are established as permanent archaeological and educational preserves.

What were the challenges and obstacles you encountered (if any) in attaining your goals and objectives? How did you overcome and/or address the challenges and obstacles? What were the lessons learned?
The Conservancy did not encounter any challenges or unexpected obstacles during the project.

Describe any unintended positive outcomes as a result of the efforts supported by this grant.
The Redtfeldt Mound Archaeological Project reconnected the local Tachi Yokut Tribe to the site. The Tribe is also acting as the site stewards and will be involved in the process of writing the management plan.

Describe the overall effect this grant has had on your organization.
The grant was instrumental in completing the Redtfeldt Mound project. The fencing and stabilization will protect the preserve and prevent future deterioration of the mound. The Stewardship Fund will pay for all future maintenance costs for the site – making funds available for other acquisition projects.

Tell us a few success stories that made an impact on your organization and/or community as a result of this grant.
As mentioned above, the success story that made the largest impact was with the local Tachi Yokut tribe. The Redtfeldt site project reconnected them with the site, whereas they didn't have prior access.

Provide a financial report on the use of your grant funds (expenditures).

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248454921
Oct. 22, 2008 LTR 4168C E0
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ARCHAEOLOGICAL CONSERVANCY
5301 CENTRAL AVE NE
ALBUQUERQUE NM 87108-1513998

025565

Employer Identification Number: 95-3403273
Person to Contact: MS. EVANS
Toll Free Telephone Number: 1-877-829-5500

Dear TAXPAYER:

This is in response to your request of Oct. 10, 2008, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in SEPT. 1979, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Michele M. Sullivan

Michele M. Sullivan, Oper. Mgr.
Accounts Management Operations I