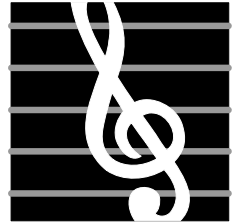
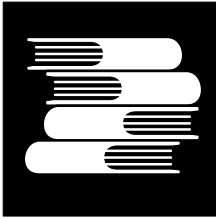


# Davis Family Foundation 2014 Annual Report



## History and Mission

The Davis Family Foundation is a public charitable foundation founded in 1986 by Mr. and Mrs. H. Halsey Davis of Falmouth, Maine, to support areas of particular interest to them. These areas are:

1. **Educational Organizations:** colleges, universities, and other educational institutions. (Grants are not made to public elementary and secondary schools, nor to schools that receive financial support from a church or other religious organization. Trustees will consider requests from other *educational organizations* whose purpose is to promote systemic change in education or provide innovative programs whose objectives are to improve education). The Foundation is particularly interested in three priority areas: early childhood education programs that promote school readiness and grade level reading by end of 3<sup>rd</sup> grade; Science, Technology, Engineering, and Math (STEM) programs that teach and engage students; middle school programs that offer effective alternative methods of education.
2. **Medical Organizations:** hospitals, clinics and medical research organizations. (Trustees will consider requests from other *similar* health organizations for programs designed to increase the effectiveness or decrease the cost of medical care.)
3. **Cultural and Arts Organizations:** organizations whose *customary and primary activity* is to promote music, theater, drama, history, literature, the arts or other similar cultural activities.

By agreement with the Internal Revenue Service, the Foundation is restricted in its grantmaking to the above three categories.

## **Policies and Application Procedure**

The Foundation accepts applications only from educational, medical, and cultural/arts organizations that are tax-exempt under Section 501(c)(3) of the IRS code and not a private foundation under Section 509(a) of the code. The Foundation has a 509(a)(3) foundation status and is prohibited from making grants to other 509(a)(3) organizations. The Foundation will need evidence of the applicant's 501(c)(3) and 509(a) status for its files.

Geographic priorities: 1. Southern Maine; 2. Other parts of Maine; 3. Other parts of New England are a low priority.

The Foundation does not make grants to individuals, religious programs or fellowships. The Foundation does not normally provide support for annual giving campaigns or general operating needs (including ongoing salaries). Grants to endowment campaigns have a low priority. Unless there are compelling reasons to do so, the Foundation does not award multiple-year grants. Organizations that receive a grant are required to wait 24 months from the deadline date before submitting subsequent requests. In addition, declined applicants should not submit a request for the same project within 12 months from the deadline date.

Trustees meet in March, June, September and December to consider requests. The respective submission deadlines are February 10, May 10, August 10 and November 10. Applications for deadlines that fall on a holiday or weekend must be received by the next business day. The Foundation does not accept applications via e-mail. You may obtain an application form and submission guidelines by contacting the Foundation office or by visiting our website. Proposals are judged on their merits and in comparison to others received. The Foundation normally notifies applicants of the Trustees' decision within one week of each regular meeting, and applicants receiving grants may expect to receive payment within a month of notification. Organizations that receive grants from the Foundation are expected to submit completion reports.

Please direct inquiries, letters and grant requests to:

**Davis Family Foundation**  
30 Forest Falls Drive, Suite 5  
Yarmouth, ME 04096  
Tel: 207 846-9132  
[www.davisfoundations.org](http://www.davisfoundations.org)

**Davis Family Foundation  
Balance Sheet  
December 31, 2014**

**Assets**

Cash	\$	40,711
Grant funds receivable		-
Due from related parties		50,831
Investments		<u>70,192,233</u>
Total assets	\$	<u>70,283,775</u>

**Liabilities and Net Assets**

Liabilities		
Accounts payable	\$	11,079
Due to related party		<u>27,075</u>
Total liabilities		38,154
Net assets		
Unrestricted net assets		<u>70,245,621</u>
Total liabilities and net assets	\$	<u>70,283,775</u>

**Davis Family Foundation**  
**Statement of Activities**  
**Year Ended December 31, 2014**

Changes in Unrestricted Net Assets	
Revenues and gains	
Return on investments	
Interest and dividends	\$ 843,225
Investment management and custodial fees	(215,312)
Realized gains on sale of investments	955,119
Net unrealized gains on investments	<u>1,379,024</u>
Total revenues and gains	<u>2,962,056</u>
Expenses	
Program services	
Grants, net of grants returned or reduced	2,249,699
Trustee fees	<u>25,000</u>
Total program services expenses	<u>2,274,699</u>
Management and general	<u>169,929</u>
Total expenses	<u>2,444,628</u>
Change in unrestricted net assets	517,428
Net assets, beginning of year	<u>69,728,193</u>
Net assets, end of year	\$ <u>70,245,621</u>

**Davis Family Foundation  
Grants Made and Payable  
During the Year Ended December 31, 2014**

**Arts and Culture**

317 Main Community Music Center, Yarmouth, ME Strengthening Communities through Access to Music Education	\$10,000
Abbe Museum, Bar Harbor, ME Coming Home Project	\$15,000
Association Culturelle et Historique du Mont-Carmel, Lille, ME Galerie Lille-sur-St-Jean (building/renovation)	\$50,000
Bagaduce Music Lending Library, Blue Hill, ME Community Arts Center (building/renovation)	\$25,000
Bangor Symphony Orchestra, Bangor, ME Know Your Orchestra! Voucher Program	\$7,500
Boothbay Harbor Memorial Library, Boothbay Harbor, ME Renovation and Expansion Project	\$20,000
Celebration Barn Theater, South Paris, ME Artist Residence Renovation Project	\$20,000
Center for Maine Contemporary Art, Rockport, ME Leaps of Imagination Art Education	\$10,000
Chesterville Center Union Meeting House Inc., Chesterville, ME Chesterville Connections (building/renovation)	\$10,000
Children's Museum & Theatre of Maine, Portland, ME Partners in Play (early childhood literacy)	\$15,000
Chocolate Church Arts Center, Bath, ME Triple Threat Performance Arts Camp	\$4,885

Cornish Veterans Monument Organization, Cornish, ME Cornish Veterans Monument	\$500
Cottage Street Creative Exchange, Inc., Norway, ME Maine Dance Project	\$5,000
Dead River Area Historical Society, Stratton, ME Replace World War II Memorial	\$1,000
Deer Isle-Stonington Historical Society, Deer Isle, ME Preserving the Past to Enrich the Future (building/renovation)	\$10,652
Denmark Arts Center, Denmark, ME Arts Center Renovation	\$5,700
Downeast Rail Heritage Preservation Trust, Bar Harbor, ME Downeast Scenic Railroad Education Program	\$8,400
Dyer Library Association dba Dyer Library & Saco Museum, Saco, ME Saco Museum Movable Wall Replacement	\$8,000
Eastport Arts Center, Eastport, ME Sound Equipment for Musical Presentations	\$8,548
Effingham Preservation Society, Effingham, NH Roof Repair: Historic Preservation	\$7,800
Fenix Theatre Company, South Portland, ME William Shakespeare's "Hamlet" (performance)	\$5,000
Firehouse Arts at Winslow Station, Yarmouth, ME Courtyard Sculpture Garden and Workplace	\$10,000
Franco-American Heritage Center, Lewiston, ME Fire and Safety Code Requirements	\$20,000
Franklin Historical Society, Franklin, ME East Franklin Schoolhouse Stabilization Project (building/renovation)	\$10,000
Freeport Community Players, Freeport, ME Freeport FebFest of Arts & Culture	\$5,000

Freeport Historical Society, Freeport, ME Pettengill Farm Wharf & Brickyard Archaeological & Educational Survey	\$5,500
Friends of Alfred Shaker Museum, Alfred, ME Renovations at Alfred Shaker Museum	\$9,700
Friends of Fort Knox, Bucksport, ME Century and a Half Masonry Project - Phase Three	\$20,000
Friends of Little River Lighthouse, East Machias, ME Light Tower and Keeper's House Painting Campaign	\$12,775
Friends of Swan Island, Richmond, ME Gardiner-Dumaresq House Painting	\$10,800
Friends of the Swan's Island Lighthouse, Swan's Island, ME Restoration of the Lighthouse Tower	\$20,000
Friends of the Zorach Fountain, Bath, ME Friends of the Zorach Fountain	\$10,000
Gardiner Library Association, Gardiner, ME Community Archives Room Renovation	\$25,000
The Grand Theater, Ellsworth, ME Grand Online Presence	\$14,000
Grime Studios, Portland, ME Grime Studios Musician Rehearsal Space (building/renovation)	\$10,000
Hampden Historical Society, Hampden, ME Preserving Cultural Heritage (building/renovation)	\$19,500
John B. Curtis Free Public Library, Bradford, ME Weatherization Project	\$9,424
Maine State Ballet, Falmouth, ME Renovations to the Maine State Ballet Theater	\$5,000
Mark and Emily Turner Memorial Library, Presque Isle, ME Turner Memorial Library Enhancement Project (equipment)	\$15,000
The McLaughlin Foundation, South Paris, ME Master Plan for the Expanded McLaughlin Garden & Homestead Campus	\$15,000



Museum L-A, Lewiston, ME Power of Music (exhibit)	\$10,000
New England Electric Railway Historical Society dba Seashore Trolley Museum, Kennebunkport, ME Preserve and Protect Campaign	\$50,000
North Haven Library, Inc., North Haven, ME Insulation of Library Building	\$6,000
Northeast Historic Film, Bucksport, ME Telling the Story of Maine	\$10,000
One Longfellow Square, Portland, ME Songs of Change Project (performance)	\$7,100
Pejepscot Historical Society, Brunswick, ME Strong, Sealed, Secure: Chamberlain Museum (building/renovation)	\$10,000
Peninsula Pan, Inc., Blue Hill, ME PanNE Steel Band Festival	\$7,500
Penobscot Theatre Company, Bangor, ME Bangor Opera House Masonry and Stage Lighting	\$10,000
The Pierre Monteux Memorial Foundation, Inc., Hancock, ME Renovating Campus Facilities and Preparing for the Future	\$10,000
Poland Spring Preservation Society, Poland, ME Enhancing Access to a National Historic Site (equipment)	\$15,000
Portland Chamber Music Festival, South Portland, ME SPACE Partnership for Contemporary Chamber Music	\$2,500
Presque Isle Historical Society, Presque Isle, ME Maysville Museum Project - Phase 2 (building/renovation)	\$25,000
Quoddy Tides Foundation, Eastport, ME Transforming the Eastern Coast of Maine (building/renovation)	\$45,000
Schoodic International Sculpture Symposium, Steuben, ME Sculpture Symposium	\$10,000
Sebago-Long Lake Music Festival, Harrison, ME Pathway to Chamber Music 2014	\$3,500

Simpson Memorial Library, Carmel, ME Proud of Our Past - Building Our Future	\$20,000
Society for the Preservation of New England Antiquities, Wiscasset, ME Preservation of Castle Tucker (building/renovation)	\$20,000
Stanley Museum, Inc., Kingfield, ME Building Revitalization	\$10,000
Stockton Springs Community Library, Stockton Springs, ME Insulate the Library	\$15,000
Stonington Public Library, Stonington, ME Long-term Energy Conservation (building/renovation)	\$12,000
Tate House Museum, Portland, ME Sealing the Building Envelope	\$38,000
Theater At Monmouth, Monmouth, ME Renovation of Toad Hall	\$25,000
Town of Andover, Andover, ME Andover Public Library Electrical Renovation	\$7,000
Town of Columbia Falls, Columbia Falls, ME Union Hall Restoration Project - Interior and Utilities	\$10,000
Town of Whiting, Whiting, ME Restoration of the Union Meeting House	\$25,000
Turner Public Library, Turner, ME Early Literacy iPad Initiative	\$3,322
Union Historical Society, Union, ME Robbins House Moisture Abatement	\$10,000
Waterford Library Association, Waterford, ME Growing Our Patron Base (building/renovation)	\$9,618
Waterville Opera House, Waterville, ME Capacity Building Project/Energy Efficiency Upgrades	\$10,000
Wells Public Library Foundation, Wells, ME Growing Again (building/renovation)	\$25,000

West Quoddy Head Light Keepers Association, Inc., Lubec, ME Technology Upgrade	\$950
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<b>Total Arts and Culture</b>	<b>\$957,174</b>
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### Education

Berwick Academy, South Berwick, ME Wellness Center (building/renovation)	\$30,000
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Children's Dyslexia Center, Portland, ME Remediate Dyslexia in Children	\$10,000
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Circus Conservatory of America, Portland, ME Launch of Circus Atlantic on Thompson Point	\$50,000
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Educate Maine, Portland, ME Education Indicators Report and Public Engagement Campaign	\$25,000
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Foundation for Maine's Community Colleges, South Portland, ME Developmental Mathematics Laboratory (building/renovation)	\$75,000
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Gedakina, Inc., Bangor, ME Our Stories - Enhancing Children's Reading, Imagination & Creativity	\$10,000
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The Good Will-Hinckley Home Association, Hinckley, ME L.C. Bates Museum: Looking at our World and Beyond	\$5,200
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Heartwood College of Art, Biddeford, ME Art to Heal at Heartwood College of Art	\$10,000
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Herring Gut Learning Center, Port Clyde, ME School of Roots	\$10,000
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Jobs for Maine's Graduates, Inc., Augusta, ME Applied Learning in Cumberland County	\$29,878
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LearningWorks, Portland, ME Youth Building Alternatives Technology Initiative	\$11,745
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Maine Youth Leadership, Portland, ME Annual Seminar	\$5,000
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Meridian Stories, Freeport, ME Maine Youth: Stories Inside, Outside and On the Stage	\$15,000
Morrison Center, Scarborough, ME Building Security Project	\$25,000
My Place Teen Center, Westbrook, ME Youth Leadership Academy	\$35,000
Robotics Institute of Maine, Westbrook, ME High School Team Support and Competitions	\$25,000
Somali Bantu Youth Association of Maine, Lewiston, ME A Child Enrichment Program for Immigrant and Refugee Children	\$10,000
Trekkers, Thomaston, ME Trekkers' Expansion Project	\$25,000
Tri-County Literacy, Bath, ME Read With Me Family Literacy Program	\$7,500
University of Maine, Orono, ME Maine Data Literacy Project	\$25,000
University of New England, Biddeford, ME Restoring a Sense of Place for Students (building/renovation)	\$75,000
Waynflete School, Portland, ME Sustainable Ocean Studies Program	\$16,000
<b>Total Education</b>	<b>\$530,323</b>

### Medical

Aroostook Hospice Foundation dba Aroostook House of Comfort, Presque Isle, ME Building Fund for the Aroostook House of Comfort	\$100,000
Cary Medical Center, Caribou, ME Aroostook Eating Disorder Initiative	\$14,650
Crisis and Counseling Centers, Inc., Augusta, ME Electronic Health Records Without Walls (equipment)	\$15,000

Eastern Maine Medical Center, Bangor, ME Remarkable Begins With You (building/renovation)	\$100,000
Foundation for Blood Research, Scarborough, ME Visual Screening Test for Arsenic	\$15,000
Health Access Network, Lincoln, ME Dental Equipment	\$27,281
HealthInfoNet, Portland, ME Developing a Statewide Strategy for Shared Care Planning	\$50,000
HomeHealth - Visiting Nurses of Southern Maine, Saco, ME Chronic Care Telehealth Project (equipment)	\$43,050
Inland Hospital, Waterville, ME Centralized Fetal Monitoring System	\$25,000
Island Commons Resource Center, Chebeague Island, ME Kitchen Renovation	\$15,000
Maine Coast Memorial Hospital, Ellsworth, ME Obstetric Department Renovations and Upgrades	\$15,000
Maine Dental Health Out-Reach, Inc., Winthrop, ME School Oral Health Program	\$25,000
Maine Medical Center, Portland, ME Honor My Wishes: A Systems Approach to Palliative Care	\$75,000
Maine Quality Counts, Manchester, ME Transitioning Maine Community Care Teams to Sustainability	\$75,000
Penobscot Valley Hospital, Lincoln, ME Obstetrical Care Improvements in Rural Maine (equipment)	\$25,000
Penquis Community Action Program, Inc., Bangor, ME Electronic Medication Barcode Technology	\$10,000
Southern Maine Agency on Aging, Scarborough, ME Creating a Better Day (building/renovation)	\$100,000
Southern Maine Health Care, Biddeford, ME Cardiopulmonary Rehabilitation Program (equipment)	\$18,721

Vinalhaven Eldercare Services, Inc., Vinalhaven, ME \$8,500  
Electronic Medical Records Infrastructure

**Total Medical** \$757,202

**TOTAL GRANTS** \$2,244,699



# **Davis Family Foundation**

## **Trustees**

David J. Bucci  
Rebekah A. Bucci, Chair  
Michael R. Currie  
Samuel M. DiCapua  
Ralph I. Lancaster, Jr.  
Kevin P. McCarthy  
Anne B. Pringle

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## **Staff**

Anne M. Vaillancourt, Executive Director  
Roxanne M. Miller, Program Officer  
Kathryn L. Davidson, Grants Associate

*Member of  
Exponent Philanthropy  
Maine Association of Nonprofits  
Maine Philanthropy Center*