

# **Davis Educational Foundation**

## **2016 Annual Report**



## **History and Mission**

The Davis Educational Foundation was established by Stanton and Elisabeth Davis after Mr. Davis's retirement as chairman of Shaw's Supermarkets, Inc. in 1985. The Foundation seeks to strengthen regionally accredited baccalaureate degree granting colleges and universities (public and private) located in New England.

## **Objectives**

The Foundation seeks to strengthen the undergraduate programs of public and private, regionally accredited, baccalaureate degree granting colleges and universities in New England. The Foundation is interested in supporting more effective teaching and learning. The Foundation is interested in controlling costs.

In order to achieve these objectives, the Foundation has funded:

Projects that improve the curriculum, the learning environment, assessment of undergraduate learning outcomes, faculty development, incentive systems, and administrative structures.

Collaborative efforts among colleges and universities to reduce costs and improve learning.

Studies and planning efforts central to the Foundation's concerns and interests.

The Foundation does not fund endowments or scholarships nor does it make grants to capital campaigns. The Foundation typically does not make concurrent awards to institutions.

## Grant Programs

The Foundation operates two grant programs. Implementation Grants represent the Foundation's long standing grant program and serves the Foundation's objectives of improving teaching and learning and/or controlling costs and increasing student affordability.

Applications for Implementation Grants are accepted three times each year on March 15, May 15 and October 1. Submissions must be received by noon on the deadline date or the preceding business day when the date falls on a weekend or holiday.

The Presidential Grant Program was more recently introduced as an entry point for addressing cost and affordability objectives. The Presidential Grant Program seeks to assist college and university leaders in laying the foundation for campus-specific or collaborative initiatives to redesign ongoing practices with intent to contain cost increases and improve college affordability. Presidential Grant requests are accepted on a rolling basis for decision the following month.

Please see the Foundation's website [www.davisfoundations.org/def](http://www.davisfoundations.org/def) for additional information on the grant programs, to view and download application instructions, and for listings of recently-funded grants by topic. Prospective applicants are strongly urged to contact Foundation staff to discuss proposal ideas prior to submission.

**DAVIS EDUCATIONAL FOUNDATION**

**Balance Sheet**

**December 31, 2016**

**ASSETS**

Investments	\$100,225,806
Due from related parties	<u>52,928</u>
Total assets	<u>\$100,278,734</u>

**LIABILITIES AND NET ASSETS**

Liabilities	
Accrued expenses	\$ 83,904
Grants payable	3,183,935
Due to related party	<u>40,173</u>
Total liabilities	3,308,012
Net assets	
Unrestricted net assets	<u>96,970,722</u>
Total liabilities and net assets	<u>\$100,278,734</u>

# DAVIS EDUCATIONAL FOUNDATION

## Statement of Activities

Year Ended December 31, 2016

Changes in unrestricted net assets	
Return (loss) on investments	
Interest and dividends	\$ 1,208,059
Investment management and custodial fees	(563,715)
Net realized (losses) on sale of investments	(388,686)
Net unrealized gains on investments	<u>5,018,320</u>
Total revenues and (losses) gains	<u>5,273,978</u>
Expenses	
Program services	
Grants, net of returns	4,309,194
Trustee fees	140,000
Travel	<u>20,427</u>
Total program services expenses	<u>4,469,621</u>
Management and general	<u>278,731</u>
Total expenses	<u>4,748,352</u>
Change in unrestricted net assets	525,626
Net assets, beginning of year	<u>96,445,096</u>
Net assets, end of year	<u>\$ 96,970,722</u>

**Davis Educational Foundation  
Grants Made and Payable  
During the Year Ended December 31, 2016**

**American International College**

Springfield, MA

Joint Purchasing Initiative

\$90,000 over 2 years

Project Leader: Vincent M. Maniaci

*To expand the collaborative initiatives of the Cooperating Colleges of Greater Springfield.*

**American International College**

Springfield, MA

Excellence in Teaching, Learning and Scholarship

\$186,400 over 3 years

Project Leader: Raj Parikh

*To support improvements in instruction, scholarship of teaching and learning, assessment of learning outcomes, and technology integration.*

**Anna Maria College**

Paxton, MA

Presidential Grant

\$10,000 over 1 year

Project Leader: Christine Holmes

*To develop plans for accelerating time to graduation.*

**Bates College**

Lewiston, ME

Academic Resource Commons: Reimagining A Liberal Arts Education

\$223,536 over 3 years

Project Leader: Daniel Sanford

*To launch an Academic Resource Commons as a student-run and student-focused set of academic support services including tutoring, workshops, supplemental instruction, and learning strategies.*

**Bennington College**

Bennington, VT  
Presidential Grant  
\$2,500 over 1 year  
Project Leader: Mariko Silver

*To support Phase One of Trustee Philanthropic Partnerships.*

**Burlington College**

Burlington, VT  
Presidential Grant  
\$2,500 over 1 year  
Project Leader: Carol Moore

*To conduct a College Council Retreat.*

**Cambridge College**

Cambridge, MA  
Center for Excellence in Learning and Teaching  
\$297,465 over 3 years  
Project Leader: Gilda Gely

*To deliver student academic support services and faculty development programming.*

**Castleton University**

Castleton, VT  
An Integrative Learning Pathway: Foundations, Connections, Directions  
\$85,000 over 1 year  
Project Leader: Ingrid Johnston-Robledo

*To create an Integrative Learning Pathway within the General Education Program to encourage students to reflect on and connect their learning.*

**Colby College**

Waterville, ME  
Writing in the Majors for All Students  
\$215,678 over 2 years  
Project Leader: Stacey Sheriff

*To improve the abilities and skills needed for writing effectively in the majors and to create an integrated, formalized set of multilingual writing resources for students and faculty.*

**College of Our Lady of the Elms**

Chicopee, MA

Academic Success Program Impacting Retention and Engagement  
(ASPIRE)

\$263,817 over 3 years

Project Leader: Joyce Hampton

*To create culturally-competent and technology-rich student advising, support services and career exploration opportunities.*

**Endicott College**

Beverly, MA

Digital Liberal Arts and Critical Inquiry

\$106,043 over 2 years

Project Leader: Laura Rossi Le

*To extend critical thinking across the liberal arts curriculum by systematically integrating digital literacy into the undergraduate classroom.*

**Fairfield University**

Fairfield, CT

Implementing a Revised Core Curriculum: Maintaining Tradition while  
Preparing for the Future

\$138,000 over 2 years

Project Leader: Christine Siegel

*To assist faculty as they implement a revised core curriculum, with emphasis on curriculum development, faculty training, and new operational efficiencies.*

**Fisher College**

Boston, MA

Presidential Grant

\$10,000 over 1 year

Project Leader: Thomas M. McGovern

*To install and implement a user-friendly data dashboard reporting system.*

**Framingham State University**

Framingham, MA

Presidential Grant

\$10,000 over 1 year

Project Leader: Scott Greenberg

*To build out FSU@MassBay, a degree completion program for community college students.*



**Goddard College**

Plainfield, VT  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Robert Kenney

*To conduct a Senior Leadership Retreat.*

**Goodwin College, Inc.**

East Hartford, CT  
Universal Design for Learning  
\$129,788 over 3 years  
Project Leader: Diana LaRocco

*To assist faculty in implementing the principles of Universal Design for Learning into their curricula to ensure inclusivity, fairness, and equity for all students.*

**Gordon College**

Wenham, MA  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Janel Curry

*To continue presidential briefings on College finances.*

**Hampshire College**

Amherst, MA  
Presidential Grant  
\$9,750 over 1 year  
Project Leader: Eva Rueschmann

*To examine high-impact practices currently in use to inform curriculum and program efficiency decisions.*

**Husson University**

Bangor, ME  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Robert Clark

*To engage the campus community in workshops that address the link between resources and educational quality.*

**Keene State College**

Keene, NH  
Presidential Grant  
\$10,000 over 2 years  
Project Leader: Joshua Jarvis

*To redesign four administrative service areas and support effective leadership throughout the campus.*

**Laboure College**

Milton, MA  
Creating a Distinguishing General Education Core Curriculum  
\$150,000 over 2 years  
Project Leader: Albert C. DeCiccio

*To redesign curricula and instructional practices to improve student learning outcomes in critical thinking, communication, and problem solving.*

**Landmark College**

Putney, VT  
The Landmark Writing Project  
\$131,220 over 3 years  
Project Leader: John Kipp

*To integrate, articulate and apply Landmark's unique, research-based best practices for teaching and supporting writing for students with learning differences.*

**Lasell College**

Newton, MA  
Presidential Grant  
\$50,000 over 1 year  
Project Leader: Michael B. Alexander

*To support a collaborative studying lower cost models for independent colleges.*

**Massachusetts Institute of Technology**

Cambridge, MA  
Communicating the Reasoning of STEM Fields  
\$240,000 over 3 years  
Project Leader: Suzanne Lane

*To develop reasoning diagrams and accompanying instructional materials for six STEM disciplines for use at MIT and other universities.*

**Merrimack College**

North Andover, MA  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Carol Glod

*To support retreats of the Assessment Committee as they evaluate the effectiveness of a new course schedule.*

**New England College**

Henniker, NH  
Presidential Grant  
\$2,500 over 1 year  
Project Leader: Michele Perkins

*To conduct a leadership retreat to build on the College's current strategic plan.*

**Newbury College**

Brookline, MA  
Center for Student Engagement  
\$171,400 over 3 years  
Project Leader: Frank Sargent

*To improve data collection and delivery of student services and academic resources to improve student success.*

**Providence College**

Providence, RI  
Presidential Grant  
\$2,500 over 1 year  
Project Leader: Brian Bartolini

*To evaluate the effectiveness of the Providence College/Community College of Rhode Island partnership.*

**Quinnipiac University**

Hamden, CT  
College Collaborative for Interdisciplinary/Integrative Studies  
\$146,344 over 2 years  
Project Leader: Mary Paddock

*To demonstrate the relevance and value of the arts and sciences through strategically revised coursework, fieldwork and advising.*

**Rhode Island School of Design**

Providence, RI  
Presidential Grant  
\$2,500 over 1 year  
Project Leader: Mara Hermano

*To conduct a strategic planning retreat.*

**Saint Michael's College**

Colchester, VT  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Patrick Gallivan

*To establish a comprehensive student development program linking the liberal arts curriculum and co-curriculum with work experience and career preparation.*

**Salve Regina University**

Newport, RI  
Integrated Learning for Civic Engagement  
\$173,860 over 3 years  
Project Leader: Laura L. O'Toole

*To increase faculty and student community engagement and civic learning opportunities.*

**Simmons College**

Boston, MA  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Helen G. Drinan

*To plan for the implementation of an academic reorganization.*

**Sterling College**

Craftsbury Common, VT  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Carol Dickson

*To engage faculty in a comprehensive review and study of mission, curriculum and institutional partnerships.*

**The Boston Conservatory**

Boston, MA  
Presidential Grant  
\$9,500 over 1 year  
Project Leader: Joe Bennett

*To explore opportunities for curricular efficiency.*

**Trinity College**

Hartford, CT  
Community Learning Initiative  
\$131,410 over 3 years  
Project Leader: Carol Clark

*To promote and enable a robust experiential learning program, engaged learning environment, and increased student retention.*

**Unity College**

Unity, ME  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Sarah Cunningham

*To further strategic planning toward the redesign of the first two years of undergraduate education.*

**University of Maine**

Orono, ME  
Transforming the Undergraduate Learning Environment through the Engaged Black Bear Digital Badging Program  
\$187,245 over 2 years  
Project Leader: Claire Sullivan

*To implement an assessment and documentation system for the development of specific skills and learning outcomes of undergraduate students.*

**University of Maine at Machias**

Machias, ME  
Presidential Grant  
\$10,000 over 1 year  
Project Leader: Stuart Swain

*To develop a model for structural and academic collaboration to advance the missions of the University of Maine and the University of Maine at Machias.*

**University of Maine at Presque Isle**

Presque Isle, ME

Strengthening and Deepening Personalized Learning

\$243,223 over 2 years

Project Leader: Raymond Rice

*To provide faculty development, technology implementation, and student support toward implementation of personalized learning and student achievement of learning standards.*

**University of Maine at Presque Isle**

Presque Isle, ME

Presidential Grant

\$10,000 over 1 year

Project Leader: Linda Schott

*To advance the Multi-Campus Collaboration.*

**University of Massachusetts Dartmouth**

Dartmouth, MA

Presidential Grant

\$2,500 over 1 year

Project Leader: Magali Carrera

*To design and employ a more transparent and inclusive budgeting process.*

**University of Massachusetts Lowell**

Lowell, MA

LearningForce as a Change Agent for Students and Knowledge Sharing

\$67,100 over 1 year

Project Leader: George Hart

*To create course-specific guides to library-purchased research materials and lower cost instructional materials for faculty, staff and students.*

**University of Massachusetts System**

Boston, MA

UMass Business Process Redesign: We are Better Together

\$400,000 over 2 years

Project Leader: Lisa Calise

*To launch a Business Process Review project with the goal of upgrading the Enterprise Resource Planning systems.*

**University of Rhode Island**

Kingston, RI

Initiative to Impact: Delivering an Exceptional General Education

\$299,240 over 3 years

Project Leader: Diane Goldsmith

*To pilot new models of faculty development, assessment, student support, and affordable education resources in conjunction with a new general education program.*

**University of Saint Joseph**

West Hartford, CT

Presidential Grant

\$2,500 over 1 year

Project Leader: Michelle M. Kalis

*To develop an inclusive and data-driven process for making programmatic changes.*

**Vermont Higher Education Council**

Colchester, VT

Presidential Grant

\$2,500 over 1 year

Project Leader: Joseph Bertolini

*To conduct a leadership meeting at the Fall 2016 Action Summit.*

**Wheelock College**

Boston, MA

Presidential Grant

\$10,000 over 1 year

Project Leader: David J. Chard

*To facilitate campus-wide cost savings.*

**Total Grants Awarded**

**\$4,316,019**

# Davis Educational Foundation

## Trustees

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## Staff

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Lisa Smith, Grants Associate

## Davis Educational Foundation

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