



2023 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).
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 organizations that are tax-exempt under Section 501(c)(3) of the IRS code and not private foundations under Section 509(a) of the code. The Foundation has a 509(a)(3) 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.

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, fellowships, annual giving campaigns or for loans. The Foundation does not normally provide support for general operating needs (including ongoing salaries). Grants to endowment campaigns and scholarships 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 1, May 1, August 1 and November 1. 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 or mail. You may access the online application and submission guidelines 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 questions to:

Davis Family Foundation
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Davis Family Foundation
Balance Sheet
December 31, 2023

Assets

Cash	\$ 30,036
Interest receivable	173,368
Due from related parties, net	38,523
Investments	89,289,746
Prepaid Assets	2,633
Operating right-of-use asset	72,775
Other assets	<u>828</u>
Total assets	<u>\$ 89,607,909</u>

Liabilities and Net Assets

Liabilities	
Accounts payable	\$ 50,665
Accrued expenses	5,892
Operating lease liability	<u>76,352</u>
Total liabilities	132,909
Net assets	
Net assets without donor restrictions	<u>89,475,000</u>
Total liabilities and net assets	<u>\$ 89,607,909</u>

**Davis Family Foundation
Statement of Activities
Year Ended December 31, 2023**

Changes in net assets without donor restrictions

Net return on investments	<u>\$ 15,036,325</u>
Expenses	
Grantmaking	
Grants, net of grants returned or reduced	\$ 1,998,570
Grant related expenses	<u>160,668</u>
Total grantmaking expenses	2,159,238
General and administration	<u>101,696</u>
Total Expenses	<u>2,260,934</u>
Change in net assets without donor restrictions	12,775,391
Net assets, beginning of year	<u>76,699,609</u>
Net assets, end of year	<u>\$ 89,475,000</u>

**Davis Family Foundation
Grants Made and Payable
During the Year Ended December 31, 2023**

Arts and Culture

240 Strings, Portland, ME Free Music Education for Greater Portland Youth	\$3,540
Acorn Productions, Portland, ME Expanded Acorn Acting Academy Programming for People of All Ages	\$1,000
Aroostook Arts and Education Center DBA Wintergreen Arts Center, Presque Isle, ME Evolve Wintergreen Kids News Network and Integrate Templates for Expressive Arts Therapy Applications	\$20,000
Bagaduce Music Lending Library, Blue Hill, ME Bagaduce Music Youth Education: A Pilot Project Inspiring the Next Generation of Musical Mainers	\$5,000
Bay Chamber Concerts and Music School, Rockport, ME Bay Chamber Acoustical Treatment Project	\$40,000
Bell Hill Meetinghouse Association, Biddeford, ME Replace Main Tie Beam, Install Two New Bed Timbers and Repair Timber Frame	\$25,000
Biddeford Mills Museum, Biddeford, ME Computer Hardware and Software Upgrade	\$3,883
Bowdoin International Music Festival, Brunswick, ME Ensemble Residencies at the 2023 Bowdoin International Music Festival	\$5,000
Brick Store Museum, Kennebunk, ME Engagement Upgrades for Museum	\$4,000
Brunswick Naval Aviation Museum, Brunswick, ME Brunswick Naval Aviation Museum Exhibit Design Development	\$25,000

Caribou Historical Society & Whittier Museum, Caribou, ME Digital Equity Senior Docent Project	\$7,000
Celebration Barn Theater, South Paris, ME Repair and Protect the Basement	\$10,000
Chesterville Center Union Meeting House, Farmington Falls, ME Chesterville Meeting House Paint Restoration Completion	\$10,000
Children's Museum & Theatre of Maine, Portland, ME Children's Museum & Theatre of Maine: Centennial Anniversary Theatre Season	\$21,424
Chocolate Church Arts Center, Bath, ME Main Stage "Troll" Door	\$15,000
Citizens for Squirrel Point, Bath, ME Replace the Hiking Bridge that Controls Access to Squirrel Point Light and Bald Head Preserve	\$10,000
Classical Uprising, Portland, ME Oratorio Chorale - Sarah Kirkland Snider's Mass for the Endangered	\$4,740
Colonial Theater, Inc. DBA Augusta Colonial Theater, Augusta, ME Windows and Doors Rehabilitation Project	\$20,000
Community Little Theatre Corp DBA Lewiston-Auburn Community Little Theatre, Auburn, ME Replacement of Stage Lighting and Sound Equipment	\$20,000
Continuum Arts Collective, North Berwick, ME Art and Music as a Means to Remove Barriers	\$25,000
Dance Hall, Kittery, ME 2023 Django by the Sea Gypsy Jazz Festival	\$7,500
DaPonte String Quartet Foundation, Freeport, ME New Violinist Search	\$15,000
East Blue Hill Library Association, Blue Hill, ME The Next Chapter: The Campaign for the East Blue Hill Public Library	\$25,000
Eighth Maine Regiment Memorial Association, Peaks Island, ME Restructure of our Veranda Porch	\$25,000

Friends of First Baptist Church of Paris Maine, Paris, ME Exterior Building Restoration of the Historic First Baptist Church of Paris Hill	\$24,000
Friends of Freeport Community Library, Freeport, ME After School at FCL: Comprehensive Enrichment for Middle School Library Patrons	\$20,000
Friends of Seguin Island Light Station (F.O.S.I.L.S.), Bath, ME Gateway to Seguin	\$10,000
Friends of the Strand Theatre, Rockland, ME Through the Fog: New Windows for the Historic Strand Theatre	\$8,550
Hampden Historical Society, Hampden, ME Basement Repairs for Long-term Structural Integrity of the Kinsley House Museum	\$20,000
Harrison Historical Society, Harrison, ME Modernizing Computer Systems to Preserve History	\$4,000
Haystack Mountain School of Crafts, Deer Isle, ME Support Longtime and Impactful Teen Program Studio Based Learning	\$10,000
Kezar Falls Circulating Library, Parsonsfield, ME Accessibility Ramp Project	\$8,000
Lamoine Community Arts, Ellsworth, ME LCA Basement Energy Efficiency	\$13,000
Mad Horse Theatre Company, South Portland, ME Theatre Audience Chairs and Risers Purchase and Installation Project	\$5,000
Maine Academy of Modern Music, Portland, ME Music Education Programming for 8 to 18-year-olds through the Boys and Girls Club of Southern Maine	\$5,000
Maine Charitable Mechanic Association, Portland, ME Mechanics' Hall Building Master Plan	\$15,000
Maine Humanities Council, Portland, ME Humanities Outreach: Maine Department of Corrections	\$10,000

Maine Preservation, Yarmouth, ME Curriculum Development for Community Preservation Youth Programs	\$7,500
Maine Public, Lewiston, ME Maine Public New Rural Radio Signals	\$25,000
Maine State Museum, Augusta, ME Art and Nature: Creating an Interactive Mural for Early Learners at the Maine State Museum	\$15,000
Maine State Music Theatre, Brunswick, ME East Coast Premiere of Rapunzel, Part of MSMT's 2023 Theatre for Young Audiences Series.	\$10,000
Old Head Tide Church Committee AKA Friends of the High Tide Church, Alna, ME Restoration of Head Tide Church Spire to Original 1838 Design	\$10,000
One Longfellow Square Inc., Portland, ME Square to Square Free Outdoor Concert Series	\$5,000
Opera Maine, Portland, ME La Cenerentola (Cinderella) by Gioachino Rossini, a Professional Opera Production Accompanied by Multi-cultural Community Programming	\$10,000
Owls Head Transportation Museum, Owls Head, ME OHTM Race to Power the Future	\$15,000
Owls Head Village Library Association, Owls Head, ME Upgrade and Refurbish the Interior of our Aging Library to Increase Safety and Efficiency	\$15,500
Peaks Island Historical Society, Peaks Island, ME Replacement of Fence at Ye Olde Trott Burial Ground	\$3,000
Pejepscot Historical Society DBA Pejepscot History Center, Brunswick, ME Public Programming and Education Infrastructure Upgrades	\$5,000
Portland Chamber Music Festival, Portland, ME 2024 Concert and Education Programs	\$12,500
Portland Lyric Theater, South Portland, ME Exterior Repair: Soffits and Windowsills Replacement	\$7,619

Portland Public Library, Portland, ME Ensuring a Safe Experience for Patrons and Staff at Portland Public Library	\$25,000
Rufus Porter Museum of Art and Ingenuity, Inc., Bridgton, ME Museum Quality Shelving and Racks for New Climate Controlled Collections Storage Room	\$10,000
Saco River Theatre, Bar Mills, ME Accessible and Affordable Live Theatre	\$10,000
Schoodic Arts for All, Winter Harbor, ME After-School Art Club	\$15,000
Sedgewick-Brooklin Historical Society, Sedgwick, ME Restoration of the Steeple of the Historic Sedgwick First Baptist	\$20,000
SPACE Gallery, Portland, ME Strengthening Physical and Virtual Workplaces for SPACE's 20th Anniversary Strategic Plan	\$12,000
Stockton Springs Library Committee, Stockton Springs, ME SSLC Perennial Flower Garden	\$1,410
Swan's Island Educational Society, Swan's Island, ME Upgrading the Library's Internet Porch and Access Walkway	\$15,000
Tate House Museum, Portland, ME Preservation Projects to Maintain the Historic Tate and Means Houses	\$20,153
The 1932 Criterion Theatre, Bar Harbor, ME Improving the Sound Quality and Accessibility of the 1932 Criterion Theatre	\$10,000
The Rangeley Lakes Region Historical Society, Rangeley, ME Exhibition - The Rangeley Boat: A Maine Original	\$3,260
Waterfall Arts, Belfast, ME Glassblowing Elective Class at Waterfall Arts (WA) for Waldo County High School Students	\$15,000
Watershed Center for the Ceramic Arts Incorporated, Edgecomb, ME Watershed Studio Surge Suppression System	\$7,000
Waterville Historical Society, Waterville, ME Waterville Center for Local History and Culture	\$15,000

Watts Hall Community Players, Thomaston, ME \$35,000
Watts Hall Safety Improvement Project

Wood Island Life Saving Station Association, Kittery Point, ME \$25,000
Wood Island Life Saving Station Restoration, Phase Eight - Installing
the Finished Flooring

Total Arts & Culture \$880,579

Education

Alfond Youth & Community Center, Waterville, ME \$25,000
Teaching Tech Literacy

Bangor Young Men's Christian Association, Bangor, ME \$50,000
Site Work for an Innovative, Evidence-based YMCA Early Education
Center

Bay School, Blue Hill, ME \$50,000
Building a new Childcare Center

Coastal Kids Preschool, Damariscotta, ME \$14,000
New Sensory Play Area for NAEYC-Accredited Preschool

Girls Who Code, New York, NY \$10,000
Expanding Reach of 3rd-12th Grade Girls Who Code Afterschool
Clubs in Maine

Great Schools Partnership Inc., Portland, ME \$281,759
Boosting Student Learning & Educator Opportunity: A Maine
Opportunity Culture Network

Gulf of Maine Research Institute, Portland, ME \$25,000
Findings from the Field: Empowering the Next Generation of
Scientists through an Immersive Writing Experience

Maine Discovery Museum, Bangor, ME \$20,000
STEM Education for Maine

NFI North, Inc., Contoocook, NH \$10,000
Sound Garden to Promote the Social, Cognitive, Physical, and
Emotional Well-being of Children.

Sandcastle Clinical and Educational Services, Lewiston, ME Pediatric Speech Language Pathology Internships	\$20,000
Team Long Run, Bethel, ME Early Literacy Program for Title 1 and Head Start Students	\$20,000
Telling Room, Portland, ME Build Capacity of Literary Arts Education Programs	\$6,000
The Community School of Mount Desert Island, Mount Desert, ME Barn Renovation: Middle School Classroom, School Library, and Community Space	\$25,000
Trekkers, Rockland, ME Uplifting Rural Outcomes Through School Bonding and Connectedness	\$12,400
University of Maine, Orono, ME Educating for the Athletic Trainer Gap: Creating Maine's First Athletic Training Simulation Laboratory	\$25,000

Total Education **\$594,159**

Medical

Ashland Ambulance Service (Town of Ashland), Ashland, ME Video Laryngoscopes	\$7,613
Cedars Nursing Care Center, Inc., Portland, ME The Cedars Community Services Center: Telehealth Intervention Program for Seniors (TIPS)	\$20,000
Central Aroostook County Emergency Medical Services Authority, Blaine, ME Mechanical Stretcher to Reduce Risk for Patients and EMTs	\$20,000
Community Dental, Portland, ME Improving Efficiency and Quality of Oral Health Care at Biddeford Dental Center	\$20,000

Hospice of Southern Maine, Scarborough, ME Gosnell Sustainability - Integrating Energy Efficient HVAC Systems and Upgrades to Improve Patient Comfort, Reduce Operating Costs, and Protect the Environment	\$45,000
MaineHealth DBA Maine Medical Center, Portland, ME Contingency Management: An Evidence-Based Treatment Strategy to Address Psychostimulant Use Disorder	\$141,837
Mainely Smiles DBA Mainely Teeth, Portland, ME Expansion of MaineCare Oral Health Provider Network	\$25,000
Milestone Recovery, Portland, ME Expanding Substance Use Treatment for Low-Income Mainers	\$100,000
Mothers' Milk Bank Northeast, Inc., Newton U F, MA Donor Milk for Healthy Babies: Developing Partnerships and Promoting Awareness for Access to Donor Milk	\$15,000
Mount Desert Island Hospital, Bar Harbor, ME MDI Hospital Core Generation Renovation Project: Construction of a Central Utility Plant	\$50,000
Oasis Health Network Inc., Brunswick, ME Oasis Free Clinics Relocation and Expansion	\$25,000
Opiate-Free Island Partnership Inc., Deer Isle, ME OUD Harm Reduction in the Deer Isle-Stonington Community	\$10,000
The Kita Center, North Berwick, ME Kita Medical Facility – Opening Doors	\$37,000
The Northern Lighthouse, Inc., Presque Isle, ME Eye Movement Desensitization and Reprocessing Therapy (EMDR) Training for Clinicians	\$16,000
Total Medical	\$532,450

TOTAL GRANTS

\$2,007,188

Davis Family Foundation

Trustees

David J. Bucci
Rebekah A. Bucci, Chair
Michael. R. Currie
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