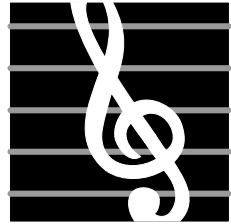
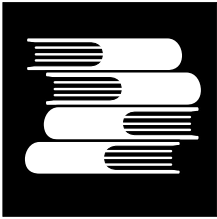


**Davis Family Foundation  
2007 Annual Report**



## 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 whose financial support is derived primarily 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 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. Grants to endowment campaigns have a low priority. Unless there are compelling reasons to do so, the Foundation does not award multiple-year grants. In order to support as many worthwhile organizations as possible, the Foundation discourages organizations that have received a grant from submitting requests in consecutive years. In addition, declined applicants should not submit a request for the same project within 12 months.

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. 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**  
4 Fundy Road  
Falmouth, Maine 04105

Tel: 207-781-5504  
[www.davisfoundations.org](http://www.davisfoundations.org)

**Davis Family Foundation  
Balance Sheet  
December 31, 2007**

**Assets**

Cash	\$ 44,946
Interest receivable	52,809
Unspent grant funds receivable	10,000
Due from related party	16,872
Investments	<u>66,777,429</u>
 Total assets	 <u>\$66,902,056</u>

**Liabilities and Net Assets**

Liabilities	
Accounts payable	\$ 39,949
 Net assets	
Unrestricted net assets	<u>66,862,107</u>
 Total liabilities and net assets	 <u>\$66,902,056</u>

**Davis Family Foundation**  
**Statement of Activities**  
**For the Year Ended December 31, 2007**

Changes in Unrestricted Net Assets	
Revenues and losses	
Income on investments	
Interest and dividends	\$ 1,238,580
Investment management and custodial fees	(277,021)
Realized gains on sale of investments	7,586,999
Net unrealized (losses) gains on investments	<u>(2,783,926)</u>
Total revenues and losses	<u>\$ 5,764,632</u>
Expenses	
Program services	
Grants	\$ 2,112,427
Grant money returned from prior years	\$ (82,743)
Other expenses	<u>25,000</u>
Total program services expenses	<u>2,054,684</u>
Management and general	<u>118,538</u>
Total expenses	<u>2,173,222</u>
Increase in unrestricted net assets	3,591,410
Net assets, beginning of year	<u>63,270,697</u>
Net assets, end of year	<u>\$ 66,862,107</u>

**Davis Family Foundation  
Grants Made and Payable  
During the Year Ended December 31, 2007**

**Arts and Culture**

317 Main Street Community Music Center, Yarmouth, ME Music Program Capacity Building	\$10,000
Acorn Productions, Portland, ME Acorn Shakespeare Ensemble Production	\$5,000
Bangor Ballet, Bangor, ME Alice in Wonderland	\$8,342
Bangor Band, Bangor, ME Upgrade of Bangor Band Percussion Equipment/Carrying Cases	\$4,000
Bangor Historical Society, Bangor, ME Build a Museum Worthy of Bangor's History	\$25,000
Bangor Symphony Orchestra, Bangor, ME Spirit of Bangor	\$7,500
Bar Harbor Brass Week, Bar Harbor, ME Bar Harbor Brass Week	\$3,000
Beals Historical Society, Beals, ME Beals Historical Society Museum	\$20,000
Belfast Historical Society and Museum, Inc., Belfast, ME Facility Renovation and Expansion	\$2,500
Brunswick Area Arts and Cultural Alliance, Brunswick, ME Artscape: The Guide to Midcoast Arts, Culture and Heritage Discoveries	\$6,000
Camden Civic Theatre, Camden, ME Camden Civic Youth Theatre	\$1,000
Camden International Film Festival, Camden, ME Filmmakers Speaker Series	\$2,500

Carrabassett Valley Public Library, Carrabassett Valley, ME Building for the Future	\$30,000
Center for Maine Contemporary Art, Rockport, ME Marketing and Communications Initiatives	\$9,000
Chebeague Island Historical Society, Chebeague Island, ME Collection Project	\$7,500
Community Little Theatre, Auburn, ME High School Musical	\$5,000
The Community Television Network, Portland, ME Bridging the Digital Divide	\$5,000
A Company of Girls, Portland, ME Artists' Sketchbooks and Illustrated Diaries: Exploring the In/Visible	\$5,000
Falmouth Historical Society, Falmouth, ME The Heritage Museum-Phase Two	\$10,000
Franco-American Heritage Center (FAHC), Lewiston, ME Marketing and Development Initiative	\$20,000
Friends of Montpelier, Thomaston, ME Restoration of Montpelier	\$15,000
Friends of the Waterboro Public Library, Waterboro, ME The New Waterboro Public Library Project	\$15,000
Friends of the Winn House, Ogunquit, ME The Dory Project	\$5,000
Grand Auditorium of Hancock County, Ellsworth, ME Film Projector Upgrade	\$10,000
Grand Lake Stream Folk Art Festival, Lubec, ME Sustaining Community: The Grand Lake Stream Folk Art Festival	\$10,000
Grand Lake Stream Historical Society, Grand Lake Stream, ME Construct a New Building to House the Canoe Collection	\$10,000
Greater Portland Landmarks, Inc., Portland, ME Center for Architecture and Preservation Capital Campaign	\$100,000

Gundalow Company, Portsmouth, NH Gundalow Outreach Programs	\$3,423
Jackman Moose River Historical Society, Jackman, ME Window Repairs and Window Shade Purchase	\$9,825
Johnson Hall Performing Arts Center, Gardiner, ME New Roof for Historic Johnson Hall	\$10,000
Lincoln Street Center for Arts and Education, Rockland, ME Artist in Residence	\$4,000
Long Lake Public Library, St. Agatha, ME Computer Software Project	\$5,000
Machiasport Historical Society, Machiasport, ME Urgent Repairs to Machiasport Historical Society	\$20,000
Maine Art Museum Trail, Ogunquit, ME Trail Guide and Web Site	\$20,000
Maine Arts Commission, Augusta, ME Building Bridges in French North America	\$7,500
Maine Folk Art Trail 2008 Project, Richmond, ME Maine Folk Art Trail 2008	\$12,500
Maine Forest and Logging Museum, Orono, ME Lombard Log Hauler Restoration	\$20,000
Maine Jewish Film Festival, Portland, ME 11th Annual Jewish Film Festival	\$5,000
Maine Public Broadcasting Corporation, Lewiston, ME Conversations with Maine	\$27,025
Maine Reads, Portland, ME Maine Festival of the Book	\$5,000
Maine State Ballet, Falmouth, ME Showcase Theater	\$15,000
Maine State Music Theatre, Brunswick, ME 2007 Children's Series Support	\$15,000

Merrill Memorial Library, Yarmouth, ME Merrill Memorial Library Web Site Revision	\$5,000
Nasson Center Redevelopment, Inc., Springvale, ME Nasson Community Center Little Theatre	\$30,000
National Trust for Historic Preservation-Northeast Office, Boston, MA Preservation Leadership Training	\$15,000
Neeloon, Princeton, ME Teaching Our Families	\$5,500
The Neighborhood House, Northeast Harbor, ME Neighborhood House Renovations	\$15,000
North Haven Arts & Enrichment, North Haven, ME 365 Day/365 Plays	\$5,000
Ogunquit Museum of American Art, Ogunquit, ME Conservation of Permanent Art Collection	\$10,000
Old Berwick Historical Society, South Berwick, ME Counting House Museum Objects Cataloguing	\$7,500
Oratorio Chorale, Brunswick, ME Giacomo Puccini's 150th Birthday Celebration	\$2,500
Passamaquoddy Bay Symphony Orchestra, Eastport, ME Passamaquoddy Bay Symphony Orchestra	\$5,000
The Pierre Monteux Memorial Foundation, Inc., Hancock, ME Renovation of the School's Forest Studio	\$7,500
Portland Conservatory of Music, Portland, ME Music School Relocation	\$15,000
Portland Freedom Trails, Portland, ME Portland Freedom Trail	\$15,000
Portland Opera Repertory Theatre, Portland, ME Il Barbiere di Siviglia	\$15,000
Portland Symphony Orchestra, Portland, ME Financial Management and Fundraising Software and Hardware Upgrades	\$15,000

Presque Isle Historical and Geneological Society, Presque Isle, ME Restoration of the Firehouse	\$15,000
River Tree Arts, Kennebunk, ME Fiddle Contest and MerryMakers: Community Celebrations for York County	\$7,500
Royal River Chorus, Freeport, ME Chorus Riser Project	\$10,000
Sagadahoc Preservation, Inc., Bath, ME Winter Street Center Steeple Restoration	\$15,000
Sebago-Long Lake Region Chamber Music Festival, Harrison, ME Attracting a Younger Audience	\$5,000
Society for the Preservation of New England Antiquities, Boston, MA Preservation of Marrett House Barn in Standish, Maine	\$25,000
South Portland Historical Society, South Portland, ME Acquisition/Renovation of Cushing's Point/Shipyard Building to Create a History Museum	\$40,000
South Solon Historical Society, Skowhegan, ME South Solon Meeting House Restoration	\$30,000
Stage East, Inc., Eastport, ME Maine Youth Summer Theatre Institute Program	\$2,500
Strawbery Banke Museum, Inc., Portsmouth, NH Pirates or Patriots: Collaborative Museum Theatre Project	\$10,000
The Theater At Monmouth, Monmouth, ME TAM Ticketing System	\$15,000
Town of Swan's Island Lighthouse Committee, Swan's Island, ME Window Restoration of Burnt Coat Harbor Light Station	\$7,500
Turner Public Library, Turner, ME Replacement of Office Equipment	\$2,000
VSA arts of Maine, Brunswick, ME Apprenticeships at the Park Row Gallery	\$10,000
Waterfall Arts, Belfast, ME Connections: Artists/Nature/Community	\$10,000

Waterville Public Library, Waterville, ME Waterville Public Library Capital Campaign	\$25,000
Wayne Library Association, Wayne, ME Renovation of Cary Memorial Library for Handicapped Accessibility	\$17,500
Willowbrook Museum Village, Newfield, ME Increasing Visitor Access to Cultural Opportunities	\$20,000
ART/CULTURE SUBTOTAL	\$965,615

## Education

Center for Furniture Craftsmanship, Rockport, ME Gallery Building Office Addition	\$15,000
Children Unlimited, Inc., Conway, NH The Big School That Would	\$10,000
College of the Atlantic, Bar Harbor, ME Deering Common: The First Student Center in COA's History	\$40,000
GlobalQuest, Portland, ME Introduction of Ecuador as a Host Country	\$5,000
Junior Achievement of Maine, Inc., Westbrook, ME District Wide Junior Achievement Expansion - Sanford Jr. High School	\$5,000
Kieve-Wavus Education, Inc., Nobleboro, ME The Leadership School, Aspirations Program	\$10,000
Literacy Volunteers of Aroostook County, Limestone, ME Life Skills Education	\$2,321
The Maine Campus Compact, Lewiston, ME Engaged Department Initiative	\$18,000
Maine Children's Alliance, Augusta, ME School KIDS COUNT Data Book	\$20,000
Maine Coalition for Excellence in Education, Augusta, ME Success Begins with Education	\$12,500

Maine College of Art, Portland, ME Relocation and Consolidation of Administrative Offices	\$75,000
Maine Council on Economic Education, Portland, ME Financial Literacy Standards Workshops for Educators	\$5,000
Maine Higher Education Council, Portland, ME Getting Ready for College Brochure	\$7,000
Maine Lakes Conservancy Institute, Nobleboro, ME Lakes Science Education Program - Expansion & Growth	\$7,500
32nd Degree Masonic Learning Center for Children, Portland, ME Tutoring Program	\$10,000
National Scholarship Fund, Scarborough, ME Planning Grant	\$10,000
New Country School, Inc., West Baldwin, ME Removing and Replacing Double Hung Windows	\$2,700
Northern Maine Community College, Presque Isle, ME Transforming Allied Health Education: Simulation Center	\$50,000
Rippleffect, Inc., Portland, ME Youth Leadership Summit 2007	\$10,000
Riverview Foundation, Topsham, ME The Leadership and Resiliency Program	\$6,000
University of Maine School of Law, Portland, ME Workshop on Preparing for Climate Change Impacts on Northwest Atlantic Marine Resources	\$5,000
WinterKids Education Foundation, Portland, ME Program Delivery at Biddeford Intermediate and Riverton Schools	\$10,000
York County Community College, Wells, ME Humanities Library Collection	\$15,000
EDUCATION SUBTOTAL	\$351,021

## Medical

Aroostook Medical Center, Presque Isle, ME Hematology/Oncology Expansion Project	\$50,000
Biddeford Free Clinic, Biddeford, ME Neighbor to Neighbor: Community Wellness Program	\$15,000
Blue Hill Memorial Hospital, Blue Hill, ME Digital Mammography Unit	\$25,000
Cancer Community Center, South Portland, ME Cancer Support Programs	\$10,000
Central Maine Medical Center, Lewiston, ME Critical Care Unit Capital Campaign	\$60,000
Community Dental, Portland, ME Rumford Dental Health Center	\$60,000
Counseling Services, Inc., Saco, ME Holistic Health Education Groups	\$10,000
Crossroads for Women, Inc., Portland, ME The Effects of Addiction on Friends and Family	\$6,528
Eastern Maine AIDS Network, Bangor, ME HIV Antibody Testing: From External Funding to Self Sufficiency	\$25,000
Eastern Maine Medical Center, Bangor, ME Lifetime of Care Campaign	\$25,000
Eastport Health Care, Inc., Eastport, ME Electronic Medical Records for Mental Health/Substance Abuse and Oral Health	\$25,000
Elmhurst, Inc., Bath, ME Emergency Generator	\$15,000
Equest, Kennebunk, ME School Ridership Program	\$8,000

Foundation for Blood Research, Scarborough, ME The Center for Perinatal Nutrition	\$32,716
Freedom Riders, Warren, ME Programs for Special Equestrians	\$5,000
Healthy Community Coalition, Wilton, ME Mobile Health Unit Outreach for Community Health and Education	\$20,000
Institute for Preventive Medicine and Medical Screening, Gray, ME Building a Statewide Infrastructure to Identify Families with Inherited Forms of Colorectal Cancer	\$20,000
Kennebunkport Emergency Medical Services, Kennebunkport, ME Respiratory Assessment Advantages	\$4,800
MaineGeneral Medical Center, Augusta, ME Maternity Renovation	\$37,275
Maine Primary Care Association, Augusta, ME Domestic Violence Response Initiative	\$29,972
Medical Care Development, Inc., Augusta, ME Collaborative to Develop Treatment Teams for People with Eating Disorders	\$30,000
Medical Care Development, Inc., Augusta, ME Oral Health Services Utilization by Maine Residents with Diabetes	\$15,000
Miles Health Care, Inc., Damariscotta, ME Telehomecare/Miles Home Health & Hospice	\$20,000
Morrison Development Center, Portland, ME Treatment and Assessment Room	\$50,000
Oasis Health Network, Inc., Brunswick, ME Oasis Free Dental Clinic	\$3,000
Sacopec Valley Health Center, Parsonsfield, ME Accessibility Project	\$50,000

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Shalom House, Portland, ME Gilman House	\$15,000
St. Mary's Regional Medical Center, Lewiston, ME Emergency Department Renovation and Expansion	\$50,000
Sweetser, Saco, ME Sweetser Electronic Client Record System	\$20,000
Town of Limestone, Limestone, ME Robert A. Frost Memorial Expansion Project	17,500
Town of Turner, Turner, ME Cultural Center	\$10,000
Waldo County Dental Project, Belfast, ME Waldo County Dental Project	\$10,000
Wentworth-Douglass Hospital, Dover, NH Emergency Cardiac Care in Medical Practices	\$15,000
York County Community Action Corporation, Sanford, ME Wheels That Heal	\$6,000
MEDICAL TOTALS	<u>\$795,791</u>
<b>Total Grants:</b>	<u><u>\$ 2,112,427</u></u>

## Davis Family Foundation Trustees

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