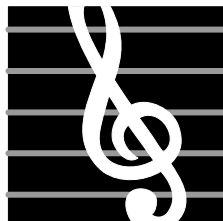
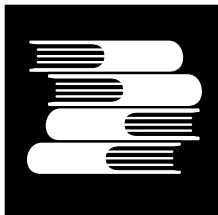


# Davis Family Foundation 2013 Annual Report



## 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). 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. In order to support as many worthwhile organizations as possible, the Foundation discourages organizations that receive a grant from submitting subsequent requests within 24 months. 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. 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, 2013**

**Assets**

Cash	\$	29,279
Grant funds receivable		8,300
Due from related parties		52,823
Investments		<u>69,669,179</u>
Total assets		<u>69,759,581</u>

**Liabilities and Net Assets**

Liabilities		
Accounts payable	\$	7,648
Due to related parties		23,740
Net assets		
Unrestricted net assets		<u>69,728,193</u>
Total liabilities and net assets	\$	<u>69,759,581</u>

**Davis Family Foundation**  
**Statement of Activities**  
**For the Year Ended December 31, 2013**

Changes in Unrestricted Net Assets	
Revenues and gains	
Return on investments	
Interest and dividends	\$ 764,831
Investment management and custodial fees	(179,004)
Realized gains on sale of investments	1,614,257
Net unrealized gains on investments	<u>6,892,921</u>
Total revenues and gains	<u>9,093,005</u>
Expenses	
Program services	
Grants	2,083,059
Trustee Fees	<u>25,000</u>
Total program services expenses	<u>2,108,059</u>
Management and general	<u>154,325</u>
Total expenses	<u>2,262,384</u>
Change in unrestricted net assets	6,830,621
Net assets, beginning of year	<u>62,897,572</u>
Net assets, end of year	\$ <u>69,728,193</u>

**Davis Family Foundation  
Grants Made and Payable  
During the Year Ended December 31, 2013**

**Arts and Culture**

19th Century Willowbrook Village, Newfield, ME Increasing Living History Education	\$20,000
Acorn Productions, Westbrook, ME Afterschool Improv Program	\$3,000
Bangor Ballet, Bangor, ME Alice in Wonderland	\$5,380
Bangor Folk Festival, Bangor, ME American Folk Festival Peking Opera Performance	\$12,000
Bangor Public Library, Bangor, ME Campaign to Renew the Library	\$25,000
Beals Historical Society, Beals, ME Phase III Cold-Storage Area	\$15,000
Belfast Free Library, Belfast, ME Teen Room Renovation	\$15,000
Bethel Historical Society, Bethel, ME Mary E. Valentine Collections Wing	\$10,000
Bowdoin International Music Festival, Inc., Brunswick, ME 50th Anniversary and Director Transition	\$15,000
Bridgton Historical Society, Bridgton, ME Archival Cataloguing Backlog	\$5,000
Brooks Historical Society, Brooks, ME Timber-Framed Barn for Historical Society	\$15,000
Brooksville Free Public Library, Brooksville, ME Expand Library	\$20,000

Charlotte Hobbs Memorial Library, Lovell, ME Increased Community Outreach through the Web (07/12/13 reallocated to stabilize and insulate the old foundation)	\$3,450
Cherryfield Academy Trustees, Cherryfield, ME Cherryfield Academy Restoration	\$20,000
Cornish Library Association d.b.a. Bonney Memorial Library, Cornish, ME Enlargement and Improvement of Library	\$20,000
Creative Portland Corporation, Portland, ME Investments in First Friday Art Walk	\$10,000
Cultural Resources, Inc., Rockport, ME New Lives/New England	\$2,000
Everyman Repertory Theatre, Rockport, ME Midcoast Arts Collaboration	\$10,000
Fiddlehead Center for the Arts, Gray, ME Fiddlehead Community Theater	\$10,000
Friends of Lithgow Library, Inc., Augusta, ME Capital Campaign to Renovate Library	\$50,000
Friends of Parsonsfield Seminary, Parsonsfield, ME Painting of Doe Hall	\$15,000
Friends of Seguin Island, Bath, ME Historical Restoration	\$9,500
Friends of the Eastern Promenade, Portland, ME Fort Allen Park Rehabilitation Project: Conserving Historic Ordinance	\$15,000
Friends of the Marsh River Theater, Brooks, ME Roofing Renovation for the Theater	\$10,000
Friends of the St. Lawrence Church, Portland, ME St. Lawrence Arts Cupola Restoration	\$15,000
The General Henry Knox Museum, Thomaston, ME Montpelier Clerestory Restoration Project	\$15,000
Historical Society of Wells and Ogunquit, Wells, ME Windows Repair and Replacement	\$20,000
History House Association d.b.a. Skowhegan History House Museum & Research Center, Skowhegan, ME Recondition Historic Windows	\$15,000

Jackman Moose River Historical Society, Jackman, ME Putting the Finishing Touches on Our Museum	\$10,000
Kezar Falls Circulating Library, Parsonsfield, ME Internet Cafe Project	\$11,516
L/A Arts, Lewiston, ME Transforming Arts Learning	\$5,000
LA Public Theatre, Lewiston, ME Lighting Grid Renovation Project	\$15,000
Lincoln County Historical Association, Inc., Wiscasset, ME Preservation and Restoration Projects	\$25,000
Lincolnvile Community Library, Lincolnvile, ME Lincolnvile Community Library Project	\$20,000
Lubec Landmarks, Inc., Lubec, ME Feasibility Study for Relocation and Rehabilitation of Brining Shed	\$5,000
Mahoosuc Arts Council, Bethel, ME Bonifantes Boys' Choir of the Czech Republic	\$8,000
Maine Academy of Modern Music, Portland, ME Music Programming for At-Risk Youth	\$10,000
Maine Forest and Logging Museum, Bradley, ME Building Renovation Project	\$10,000
Maine Historical Society, Portland, ME Home: The Wadsworth-Longfellow House and the Making of Portland Exhibit	\$15,000
Maine Humanities Council, Portland, ME New Books, New Readers	\$7,320
Maine Jazz Camp, Farmington, ME Faculty Expenses	\$5,000
Maine Preservation, Yarmouth, ME Community Revitalization Services	\$20,000
The Maine Project for Fine Art Conservation, Portland, ME Art Conservation Equipment	\$13,757
Mayo Street Arts, Portland, ME International Music Series	\$5,000
Merrill Memorial Library, Yarmouth, ME Library Renovation Capital Campaign	\$30,000



Midcoast Symphony Orchestra, Brunswick, ME Guest Artist and Conductor	\$5,000
Mount Desert Island Historical Society, Mount Desert, ME Repair and Renovation of Sound School House and Selectmen's Building	\$10,000
The Museum of African Culture, Portland, ME Interactive Cultural Enrichment Program	\$5,000
Naples Public Library, Naples, ME Gathering Room Modernization	\$8,831
Nasson Center Redevelopment, Inc. d.b.a. Nasson Community Center, Springvale, ME Preschool and Little Theatre Project	\$7,500
North Atlantic Arts Alliance, Cornish, ME The Roots & Sprouts Music Education Project	\$10,000
Northeast Harbor Library, Northeast Harbor, ME Preservation of Architectural Documents	\$5,993
Norway Landmarks Preservation Society, Norway, ME Rehabilitating the Gingerbread House	\$20,000
Old Berwick Historical Society, South Berwick, ME Old Fields Archaeology Project	\$7,000
Oratorio Chorale, Brunswick, ME Fall 2013 Concert: "Musical Fireworks"	\$2,500
Orr's Island Library, Orr's Island, ME Final Renovation Phase	\$5,000
Otisfield Historical Society, Otisfield, ME Old Town House	\$20,000
Passamaquoddy Bay Symphony Orchestra, Eastport, ME A Composers' Competition	\$2,500
Penobscot Marine Museum, Searsport, ME For Those in Peril: An Exhibit	\$10,000
Penobscot Indian Nation, Indian Island, ME Penobscot Place Name Map: Preservation of Penobscot Traditional Knowledge	\$20,000
Pihcintu Multinational Chorus, Augusta, ME Pihcintu Multinational Chorus	\$15,000
Portland Ballet Company, Portland, ME Portland Ballet Studio Theater	\$20,000

Portland Conservatory of Music, Portland, ME Community Enhancement Project	\$5,000
Portland Museum of Art, Portland, ME Art in Process	\$10,000
Portland Opera Repertory Theatre, Portland, ME Summer Opera Festival and FILMfest	\$10,000
Portland Public Library, Portland, ME Shared Collections Management Center	\$50,000
Portland Symphony Orchestra, Portland, ME Merrill Auditorium Music Library Improvement	\$9,175
Rangeley Friends of the Performing Arts, Rangeley, ME Learning Life Skills Through Music	\$5,000
Saco River Theatre, Bar Mills, ME Marketing Expansion	\$10,000
Salt Pond Community Broadcasting d.b.a WERU-FM, East Orland, ME WERU-FM 25th Anniversary Project	\$15,000
Sangerville Historical Society, Sangerville, ME Interior Addition Project	\$3,500
Schoodic Arts for All, Winter Harbor, ME Upgrading Technology to Build Organizational Capacity	\$5,000
Seal Bay Festival, Vinalhaven, ME June 2013 Seal Bay Festival	\$3,000
Shaw Public Library Association, Greenville, ME Shaw Library In-Fill	\$10,000
Skowhegan School of Painting & Sculpture, Madison, ME Red Farm Preservation and Historic Assessment	\$25,000
Strawbery Banke Museum, Inc., Portsmouth, NH Finding Home: Immigration to Portsmouth	\$10,000
The Telling Room, Portland, ME Anthology Project: WILD	\$10,000
Town of Richmond, Richmond, ME Isaac F. Umberhine Library: Young Adult Room Furnishings	\$5,590
Town of Wayne, Wayne, ME Town House Preservation Project - Final Phase	\$6,500
Town of Winthrop, Winthrop, ME Library's Expanding Our Boundaries Campaign	\$20,000

Trustees of Bloomfield Academy d.b.a Skowhegan Free Public Library, Skowhegan, ME Installation of HVAC System	\$10,000
Virginia Project, Inc., Bath, ME The Virginia Project	\$2,000
Watershed Center for the Ceramic Arts, Newcastle, ME Artist Housing for Four Seasons	\$10,000
Western Maine Art Group, Norway, ME Matolcsy Arts Center Restoration Project	\$5,000
York Art Association, York, ME Ceiling Repair and Electrical Upgrade	\$5,000

<b>Total Arts and Culture</b>	<b>\$1,035,012</b>
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## Education

Center for Furniture Craftmanship, Rockport, ME Woodturning Studio Addition	\$15,000
The Center for Teaching and Learning, Edgecomb, ME Middle School Maine Model United Nations	\$5,000
The Challenger Learning Center of Maine, Bangor, ME Missions for Maine	\$10,000
Cobscook Community Learning Center, Trescott, ME Cobscook Community Experiential High School Program	\$10,000
Downeast Institute for Applied Marine Research and Education, Beals, ME "Let's Find Out What Is Out There" Educational Program	\$17,000
Eagle Hill Institute, Steuben, ME Statewide STEM Initiative in Astronomy	\$16,000
Ecology Education, Inc. d.b.a. The Ecology School, Saco, ME Science & Ecology: Live & Unplugged!	\$10,000
Educare Central Maine, Waterville, ME Maine Shared Services Alliance	\$100,000
Foundation for Maine's Community Colleges, South Portland, ME Health Sciences Simulation Lab	\$100,000

Fryeburg Academy, Fryeburg, ME Pequawket Valley Alternative School	\$7,900
Gulf of Maine Research Institute, Portland, ME PowerHouse: Middle-School STEM	\$25,000
Hear ME Now!, Portland, ME Tele-Intervention Access Project	\$7,500
Island Institute, Rockland, ME WeatherBlur - STEM Education Initiative	\$15,000
Let's Get Ready, Boston, MA Maine Let's Get Ready Project	\$25,000
Maine Academy of Natural Sciences, Hinckley, ME Building Capacity to Improve Academic Outcomes	\$15,000
Maine Adult Education Association, Dover-Foxcroft, ME Updating the Maine Adult Education Portal	\$10,000
Maine Media Workshops, Rockport, ME Infrastructure Upgrade Project	\$15,000
Maine School of Science and Mathematics Foundation, Limestone, ME Hydroponics Greenhouse	\$45,000
North Yarmouth Academy, Yarmouth, ME Lower School: Varney Project	\$75,000
The Opportunity Alliance, Portland, ME Early Learning Mentor Initiative	\$40,000
Pequawket Kids Charitable Association, Fryeburg, ME Education Enrichment Programs	\$9,900
Saint Joseph's College, Standish, ME Paths to Success: Assistance to At-Risk Students	\$20,000
Spurwink Services, Portland, ME Compass Project Boatbuilding Program	\$15,000
The Susan L. Curtis Foundation, Portland, ME Camp Susan Curtis Online	\$10,000
Thornton Academy, Saco, ME 21st Century Curriculum-to-Career Initiative	\$25,000
Tree Street Youth, Lewiston, ME StreetLeader Program	\$10,000
Youth and Family Outreach, Portland, ME Public Pre-K Classroom	\$5,820

Youth Entrepreneurship Adventures, Portland, ME	\$15,000
Build-A-Biz Maine: Youth Education Program	

<b>Total Education</b>	<b>\$674,120</b>
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<b>Medical</b>
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Acadia Hospital Corporation, Bangor, ME	\$20,000
Cognitive Behavioral Pain Treatment Project	

Access Health d.b.a Leavitt's Mill Free Health Center, Bar Mills, ME	\$9,889
Health Screening Panel Pilot Program	

Amistad, Inc., Portland, ME	\$20,000
The Peer Coaching Initiative	

Biddeford Free Clinic, Biddeford, ME	\$10,000
Pharmacy	

Cancer Hospitality House of Maine, Bangor, ME	\$25,000
Sarah's House	

City of Portland, Portland, ME	\$7,000
Children's Oral Health Care	

Counseling Services, Inc., Saco, ME	\$10,000
Peer Support: An Alternative to Mental Health Crisis Services	

Eastern Maine HomeCare, Caribou, ME	\$25,000
Improving Home Care and Hospice through Telemedicine	

Family Hope, Scarborough, ME	\$15,000
Family Navigator Pilot Program	

Jackson Laboratory, Bar Harbor, ME	\$30,000
Triple-Negative Breast Cancer Project - Pre-Pilot Phase	

Kennebec Behavioral Health, Waterville, ME	\$4,578
Homeless Youth Neglect-Prevention Program	

Maine Family Planning, Augusta, ME	\$25,000
Increasing Access to Reproductive Healthcare	

MaineGeneral Medical Center, Augusta, ME	\$5,000
Sexual Assault Collaborative	

Mount Desert Island Hospital, Bar Harbor, ME Mount Desert Island Hospital-Penn Medicine Collaborative	\$10,000
New England Hemophilia Association, Dedham, MA Hemophilia Family Camp	\$4,500
Penobscot Community Health Center, Bangor, ME Digital Orthodontic Scanning	\$10,000
Portland Community Health Center, Portland, ME Utilizing Health IT to Improve Health Outcomes	\$20,000
Rumford Hospital, Rumford, ME Safe Patient Handling	\$30,000
Sacopec Valley Health Center, Porter, ME Accurate Vision Screening for All	\$15,000
Sandcastle Clinical and Educational Services, Lewiston, ME L/A Hearing Center Early Detection of Hearing Loss	\$12,960
Sebasticook Valley Hospital, Pittsfield, ME Do the Right Thing-Modernization Project	\$35,000
United Cerebral Palsy of Maine, Bangor, ME Washington County Children's Program - Oral Health Outreach	\$20,000
VNA Home Health Hospice, South Portland, ME Pathway to Excellence	\$10,000
<b>Total Medical</b>	<hr/> <b>\$373,927</b>
<b>TOTAL GRANTS</b>	<hr/> <b>\$2,083,059</b> <hr/> <hr/>



# 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 Davidson, Grants Associate

*Member of  
Association of Small Foundations  
Maine Association of Nonprofits  
Maine Philanthropy Center*