



2018 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 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 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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Tel: 207 846-9132
www.davisfoundations.org
dff@davisfoundations.org

Davis Family Foundation
Balance Sheet
December 31, 2018

Assets

Cash	\$ 53,060
Interest receivable	583
Due from related parties, net	31,029
Investments	64,904,772
Other assets	<u>800</u>
Total assets	<u>\$ 64,990,244</u>

Liabilities and Net Assets

Liabilities	
Accounts payable	<u>\$ 15,125</u>
Total liabilities	15,125
Net assets without donor restrictions	<u>64,975,119</u>
Total liabilities and net assets	<u>\$ 64,990,244</u>

Davis Family Foundation
Statement of Activities
Year Ended December 31, 2018

Changes in net assets without donor restrictions	
Net (loss) return on investments	<u>\$ (6,765,937)</u>
Expenses	
Grantmaking	
Grants, net of returns	\$ 3,178,812
Grant related expenses	<u>116,883</u>
Total grantmaking expenses	3,295,695
General and administrative	<u>74,304</u>
Total expenses	<u>3,369,999</u>
Change in net assets without donor restrictions	(10,135,936)
Net assets, beginning of year	<u>75,111,055</u>
Net assets, end of year	<u>\$ 64,975,119</u>

**Davis Family Foundation
Grants Made and Payable
During the Year Ended December 31, 2018**

Arts and Culture

1932 Criterion Theatre, Bar Harbor, Maine Film for All	\$5,000
317 Main Community Music Center, Yarmouth, Maine Come Together Capital Campaign	\$50,000
Abbe Museum, Bar Harbor, Maine Decolonizing the Abbe Museum	\$10,000
Baldwin Historical Society, East Baldwin, Maine Chadbourne Homestead Renovation	\$10,000
Bangor Symphony Orchestra, Bangor, Maine Bernstein's Candide and the American Sound	\$7,500
Bowdoin International Music Festival, Brunswick, Maine Expanding Access to and Preserving a Legacy of Music Education and Performance	\$10,000
Brownfield Public Library, Brownfield, Maine The Brownfield Public Library's New Roof	\$7,000
Brunswick Naval Museum and Memorial Gardens, Brunswick, Maine Flight Simulator Upgrade	\$3,000
Buck Memorial Library, Bucksport, Maine Exterior Restoration of North Chimney and Portion of North Wall	\$10,000
Canton Historical Society, Canton, Maine Canton Historical Society Paint Project	\$20,000
Castine Historical Society, Castine, Maine Abbott School Painting and Restoration Project	\$11,715
Central Aroostook Historical Society, Mars Hill, Maine Roof Replacement Central Aroostook Historical Society Headquarters	\$10,000
Chesterville Center Union Meeting House, Inc., Chesterville, Maine Chesterville Center Union Meeting House Bell Tower Restoration	\$10,000

Chocolate Church Arts Center, Bath, Maine Develop a Multi-Pronged Marketing Plan to Coincide with the Organization's Strategic Plan	\$9,300
Citizens for Squirrel Point, Arrowsic, Maine Restoration and Safeguarding of Public Access to Squirrel Point Light Facility	\$10,000
Coastal Maine Botanical Gardens, Boothbay, Maine Cultivating Joy: Strengthening CMBG's Cultural, Educational. And Economic Impact	\$50,000
Creative Portland Corporation, Portland, Maine Re-Past: Remembering Malaga	\$10,000
Curran Homestead, Orrington, Maine Empowering New Generation: Three Spaces for Experiential Learning	\$15,000
Deer Isle – Stonington Historical Society, Deer Isle, Maine Renovation of Sellers House Vault	\$15,000
Deertrees Foundation Ltd., Harrison, Maine Theatre Safety – Bathroom Replacement	\$20,000
Eastport Arts Center, Eastport, Maine First Impressions Last: A Frontal Facelift for the Eastport Arts Center	\$15,000
Eddington-Clifton Civic Center, Eddington, Maine Exterior Repairs	\$18,200
Eighth Maine Regiment Memorial Association, Peaks Island, Maine Eighth Maine Roof	\$15,000
Fort Kent Historical Society, Fort Kent, Maine Paul D. Thibodeau Visitors Center Renovation	\$15,000
Franco American Heritage Center at St. Mary's, Lewiston, Maine Technology and Amenities Upgrades	\$15,000
Franklin Historical Society, Franklin, Maine East Franklin Schoolhouse Renovation	\$25,000
Friends of Fort Knox, Bucksport, Maine Two-Step Alley Roof Maintenance and Repair	\$25,000
Friends of Liberty Hall, Machiasport, Maine Repair and Restoration of West Façade, Liberty Hall	\$28,000

Friends of Seguin Island Light Station, Bath, Maine Fog Signal House Roof	\$4,500
Friends of the St. Lawrence Church, Portland, Maine Exterior Maintenance: Painting and Gutter Repair/Replacement	\$10,000
Friends of the Strand Theatre, Rockland, Maine Broadcast Satellite System Replacement	\$3,226
Friends of the Swan's Island Lighthouse, Swan's Island, Maine Historical Restoration of the Burnt Coat Harbor Lighthouse Tower	\$10,000
Guilford Memorial Library, Guilford, Maine Guilford Memorial Library Building Renovation/Restoration Project	\$24,000
Hampden Historical Society, Hampden, Maine "Our History Lives Here" Capital Campaign	\$20,000
Herald Saeverud String Quartet Program – Passamaquoddy Bay Symphony Orchestra, Eastport, Maine Maine Composer Premier	\$2,300
Hiram Historical Society - Hiram, ME Great Ossipee Museum – Accessibility Project	\$16,214
History House Association dba Skowhegan History House Museum & Research Center, Skowhegan, Maine Restore 8 Historic Museum Windows, Replace Framing and Restore Sash of 6 Basement Windows, and Restore 2 Basement Window Screens	\$10,000
Holocaust and Human Rights Center of Maine, Augusta, Maine Glass Door for the Dorothy Alford Hall	\$5,000
Jackman Moose River Historical Society, Jackman, Maine Stabilization of Museum Building	\$10,000
Kneisel Hall, Blue Hill, Maine New Studios	\$5,000
Lewiston-Auburn Community Little Theatre, Lewiston, Maine 2018 Great Falls Performing Arts Center Renovations	\$20,000
Long Lake Public Library, St. Agatha, Maine Computers for Our Library	\$2,125
Lord's Hill Meeting House, Inc., Effingham, New Hampshire Painting Steeple	\$6,000

Maine Alliance for Arts Education, Augusta, Maine Piloting Schoolwide Teacher-Based Arts Integration in Eastport K-8	\$10,000
Maine Forest and Logging Museum, Bradley, Maine Safety and Access Improvements	\$15,000
Maine Historical Society, Portland, Maine Maine's Wabanaki: A Bicentennial Exhibition and Education Initiative	\$10,000
Maine Maritime Museum, Bath, Maine Restoration of the Historic 1906 Schooner Mary E.	\$25,000
Maine Preservation, Yarmouth, Maine Strathglass Park Neighborhood Rehabilitation Program	\$25,000
Maine Writers & Publishers Alliance, Portland, Maine Expanding Organizational & Technical Capacity	\$12,000
Maine Youth Rock Orchestra, Portland, Maine 2019 Maine Made Tour	\$5,000
Matthews Museum of Maine Heritage, Union, Maine Hodge School Floor Repair	\$4,000
Mayo Street Arts, Portland, Maine Renovation of Theater Exit to Courtyard and Outdoor Classroom Space	\$15,000
Midcoast Music Academy, Rockland, Maine Humming and Drumming: Music for Little Learners	\$5,000
Millinocket Memorial Library, Millinocket, Maine Millinocket Memorial Library Centennial Renovation: A Future Library Project	\$25,000
Monhegan Historical and Cultural Museum Association, Monhegan, Maine Ice Harvesting Exhibit Space	\$10,000
Moosehead Marine Museum, Inc., Greenville, Maine Sunken Steamboats of Moosehead Lake	\$20,000
New Surry Repertory Theatre and Acting School, Inc., Blue Hill, Maine 47 th Season	\$2,500
Newport Cultural Center and Public Library, Newport, Maine The Newport Cultural/Arts Expansion Project	\$5,000

Palermo Community Library, Palermo, Maine Environmental Controls: The Single Most Important Factor in Ensuring a Long Life for Library Collections	\$12,576
Pejepscot Historical Society, Brunswick, Maine Exterior Restoration of Joshua L. Chamberlain Museum: Phase I	\$20,000
Points North Institute, Camden, Maine Recovery in Maine: Free Screening and Community Discussion Series Confronting the Opioid Epidemic	\$15,000
Poland Spring Preservation Society, Poland Spring, Maine Repairs: All Souls Chapel and the Maine State Building	\$20,000
Portland Ballet Company, Portland, Maine Safe Ballet Flooring	\$11,500
Portland Museum of Art, Portland, Maine In the Vanguard: Haystack Mountain School of Crafts, 1950 -1969	\$10,000
Portland Stage Company, Portland, Maine LED Lighting Upgrade	\$20,000
Rangeley Friends of the Performing Arts, Rangeley, Maine Lakeside Theater Capital Improvements Project	\$25,000
Richville Library, Standish, Maine Exterior Capital Improvement Project	\$10,000
Rufus Porter Museum, Bridgton, Maine 2018 Summer Education and Curatorial/Collections Internship Program	\$5,000
Sebago-Long Lake Music Festival, Harrison, Maine From Age to Age	\$3,000
Skidompha Public Library, Damariscotta, Maine Community Voices	\$10,000
Snowlion Repertory Company, Portland, Maine Theater Production of the New Musical “Mesmerized”	\$5,000
Stockton Springs Community Library, Stockton Springs, Maine Bookshelves for “Mary’s Room”	\$1,500
Sullivan-Sorrento Historical Society, Sullivan, Maine Urann Historic Home Project	\$8,500
The McLaughlin Foundation, South Paris, Maine Transformative Gardens – Final Design	\$10,000

Timelines Community, Inc., Thorndike, Maine The Farwell Project	\$20,000
Topsham Public Library, Topsham, Maine Furniture Upgrades	\$5,000
Town of Columbia Falls, Columbia Falls, Maine Union Hall Restoration and Revitalization Project	\$15,000
Town of Rockport, Rockport, Maine Rockport Town Library Building Campaign	\$25,000
Turner Public Library, Turner, Maine Teen Project	\$8,000
Vassalboro Historical Society, Vassalboro, Maine Catching Up with Collections Stewardship at the Vassalboro Historical Society	\$10,000
Waldo Theatre, Waldoboro, Maine Raise the Roof! A Campaign to Bring Back the Waldo Theatre	\$20,000
Washington Library Association, Washington, Maine Gibbs Library Air Conditioning	\$3,400
Western Maine Play Museum, Wilton, Maine Play Museum Courtyard Project	\$4,800
Total Arts and Culture	\$1,084,856

Education

Atlantic Challenge Foundation dba The Apprenticeshop, Rockland, Maine Shop Building Renovation for Structural Protection and Energy Efficiency	\$20,000
Bates College, Lewiston, Maine STEAM Power	\$25,000
Bridgton Academy, North Bridgton, Maine Cleaves Hall Renovation	\$50,000
Castine Early Learning Center dba Community Childhood Learning Place, Castine, Maine Repurposing the 1895 Standpipe: Windows	\$17,300
Catherine Morrill Day Nursery, Portland, Maine Sprinkler Head Replacement Project	\$8,000

Challenger Learning Center of Maine, Bangor, Maine The Expedition Mars Learning Experience	\$100,000
Coastal Kids Preschool, Damariscotta, Maine NAEYC-Certified Toddler Classroom #2	\$12,000
Community Bicycle Center, Biddeford, Maine Roof Replacement: Ensuring Facility Integrity for Community-Based Education Partnerships	\$25,000
Downeast Institute for Applied Marine Research and Education, Beals, Maine Let's Find Out How to Protect Maine Species in the Natural Habitat	\$35,000
Good Will-Hinckley Home Association, Hinckley, Maine Exploring Earth and Sky: Better Understanding the World We Live In	\$11,550
Gulf of Maine Research Institute, Portland, Maine Unlocking Teachers' Potential to Inspire STEM Engagement Equitably Across Maine	\$90,000
Hebron Academy, Hebron, Maine Outfitting the Kaneb Center for Science and Engineering	\$50,000
Hurricane Island Outward Bound School, Camden, Maine Newry Staff House Project	\$15,000
Island Readers and Writers: An Initiative for Maine Children, Mt. Desert, Maine Getting the Right Start	\$10,000
Jobs for Maine's Graduates, Augusta, Maine Southern Maine JMG Middle School Program	\$25,000
Juniper Hill School for Place-Based Education, Alna, Maine Expansion to Accommodate Nature-Based Pre-School Workshops and Teacher Training	\$35,150
Kieve-Wavus Education, Inc., Nobleboro, Maine Kieve-Wavus Programming at King Middle School: Support for Educator- in-Residence	\$6,350
Literacy Volunteers of America, Waterville Area, Waterville, Maine Expanding Our Family Literacy Program	\$2,500
Maine College of Health Professions, Lewiston, Maine Innovative Technology to Enhance Health Care Student Education	\$30,000
Maine Mathematics and Science Alliance, Augusta, Maine Experiential STEM	\$100,000

Morrison Center, Scarborough, Maine Renovation of Residential Home for Children with Development and Intellectual Disabilities	\$50,000
My Place Teen Center, Westbrook, Maine Kitchen Renovation	\$50,000
Olympia Snowe Women's Leadership Institute, Portland, Maine Program Growth for the Institute's "My Values," "My Voice," and "My Vision" Program	\$50,000
Penquis Community Action, Inc., Bangor, Maine Penquis Conscious Discipline Advanced Training and Coaching	\$23,376
Portland Community Squash, Portland, Maine Portland Community Squash: Supporting the Expansion of Rally Portland	\$16,000
Rural Aspirations Project, Bar Harbor, Maine Maine Forest Collaborative	\$43,306
Saint Joseph's College, Standish, Maine A First Class SIM Learning Environment for Nursing Majors to the New Center for Nursing Innovation	\$75,000
Spirit Series, Inc., Yarmouth, Maine SPIRIT SERIES-Maine 2019 SPIRITWORKS Teacher Certification Initiative	\$20,000
Sweetser, Saco, Maine Interactive White Board Project and Software	\$15,000
The Opportunity Alliance, South Portland, Maine Project SERve	\$40,000
The Watershed Community Institute dba The Watershed Community School, Camden, Maine New Schoolhouse Initiative	\$15,000
Thornton Academy, Saco, Maine Athletic Complex Capital Campaign	\$35,000
Trekkers, Thomaston, Maine Trekkers High School Support Program	\$29,700
University of Maine at Farmington, Farmington, Maine UMF Sweatt-Winter Early Care and Education Center Improvement Plan	\$38,495
University of Maine at Presque Isle, Presque Isle, Maine Innovation in Clinical Experiences in Recruiting and Training Future Medical Laboratory Technicians	\$50,000

University of Maine System – Chancellor’s Office, Bangor, Maine Engaging with the ACRL Framework: A Catalyst for Exploring Our Teaching Practice	\$6,500
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University of Southern Maine, Portland, Maine Maine LEAP Year 3 Match & Postsecondary Student Voice Strategy	\$10,000
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Total Education	\$1,235,227
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Medical

Aroostook Agency on Aging, Presque Isle, Maine Aroostook Aging and Disability Resource Center	\$15,000
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Aroostook Mental Health Services, Inc., Caribou, Maine AMHC Roof Replacement	\$40,000
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Community Health and Counseling Services, Bangor, Maine Primary Care Practice Start-Up	\$12,000
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Daniel Hanley Center for Health Leadership, Portland, Maine Improving Health by Mitigating Detrimental Impacts of Social Determinants of Health in Maine	\$10,000
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Fryeburg Rescue Association, Fryeburg, Maine Zoll X Series	\$15,000
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Greater Portland Health, Portland, Maine Telehealth Services for Portland’s Public Housing Sites	\$25,000
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Kennebec Valley Dental Coalition, Waterville, Maine Preserving Safety Net Dental Services for Central Maine	\$35,000
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Kennebec Valley Family Dentistry, Augusta, Maine Emergency Replacement of X-Ray Machine and Request for Additional Items	\$28,000
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Kennebec Valley Mental Health Center dba Kennebec Behavioral Health, Waterville, Maine Topsham Clubhouse	\$20,000
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Maine Dental Health Out-Reach, Inc., Winthrop, Maine School Oral Health Program	\$15,000
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Maine Family Planning, Augusta, Maine The Reproductive Empowerment Project	\$15,000
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Maine Medical Center, Portland, Maine The NEXT 150 – The Campaign for Maine Medical Center	\$200,000
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MaineHealth Care at Home, Saco, Maine Connected Care Clinics: Nurse-Led Health Clinics with Telehealth for Long Island and Chebeague Island	\$24,800
Mercy Hospital, Portland, Maine Fore River II	\$100,000
Mid-Coast Health Net dba Knox County Health Clinic, Rockland, Maine Improving Dental Care for Low Income Families	\$22,000
Milestone Foundation, Inc., Portland, Maine Homeless Outreach and Mobile Engagement (HOME) Team	\$10,000
Northern Light Inland Hospital, Waterville, Maine RehabWorks Equipment Upgrades	\$30,000
Northern Lighthouse, Inc., Presque Isle, Maine Technology and Human Services	\$7,000
Oasis Health Network, Inc. dba Oasis Free Clinics, Brunswick, Maine Free Care Navigation Pilot	\$10,000
Pen Bay Medical Center, Rockland, Maine New Patient Health Center	\$100,000
Penobscot Community Health Center, Bangor, Maine Brining the Future to the Past: Utilizing Telemedicine to Maximize Limited Resources in the Care of Maine’s Elders	\$50,000
Southern Maine Agency on Aging, Scarborough, Maine “Agewell” Evidence-Based Prevention Program	\$35,000
Spurwink Services, Portland, Maine Spurwink Project Access: Utilizing Remote Access HER to Improve Behavioral Health Care	\$25,000
Sunrise Opportunities, Machias, Maine Washington County Dental Outreach Clinic	\$15,000
Wentworth-Douglass Hospital, Dover, New Hampshire Upgrade of Digital Panoramic Radiographic Equipment	\$16,000
Total Medical	\$874,800

TOTAL GRANTS	\$3,194,883
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Davis Family Foundation

Trustees

David J. Bucci
Rebekah A. Bucci, Chair
Michael. R. Currie
Samuel M. DiCapua
Edward L. Dilworth III
Colleen Bucci Liddy
Al Noyes
Anne B. Pringle

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Yvonne B. Mummé, Chief Finance and Administrative Officer
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