



2019 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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**Davis Family Foundation
Balance Sheet
December 31, 2019**

Assets

Cash	\$ 57,994
Interest receivable	306
Due from related parties, net	28,093
Investments	75,981,749
Other assets	<u>822</u>
Total assets	<u>\$ 76,068,964</u>

Liabilities and Net Assets

Liabilities	
Accounts payable	<u>\$ 23,334</u>
Total liabilities	23,334
Net assets	
Net assets without donor restrictions	<u>76,045,630</u>
Total liabilities and net assets	<u>\$ 76,068,964</u>

**Davis Family Foundation
Statement of Activities
Year Ended December 31, 2019**

Changes in net assets without donor restrictions

Net return (loss) on investments	<u>\$ 13,572,032</u>
Expenses	
Grantmaking	
Grants, net of grants returned or reduced	\$ 2,289,075
Grant related expenses	<u>137,146</u>
Total grantmaking expenses	2,426,221
General and administrative	<u>75,300</u>
Total expenses	<u>2,501,521</u>
Change in net assets without donor restrictions	11,070,511
Net assets, beginning of year	<u>64,975,119</u>
Net assets, end of year	<u>\$ 76,045,630</u>

**Davis Family Foundation
Grants Made and Payable
During the Year Ended December 31, 2019**

Arts and Culture

A Company of Girls, Portland, Maine Arts-Based Empowerment, Leadership & Resiliency Programming for Girls	\$10,000
Acorn Productions, Portland, Maine Expansion of Acting Classes to Include on Camera Work	\$2,000
Albion Public Library, Albion, Maine Albion Public Library Renovation and Addition	\$10,000
Apogee Arts dba Alison Chase Performance Alison Chase/Performance 10 th Anniversary Season Performance and Community Engagement Programming	\$5,000
Bar Harbor Festival Corporation, Bar Harbor, Maine BH Festival Opera “Carmen” at the Criterion Theatre & Young Audience Performance at Jesup Library	\$10,000
Belfast Creative Coalition, Belfast, Maine Marketing and Outreach Enhancement Project	\$4,403
Berwick Library Association, Berwick, Maine Berwick Public Library Interior Refurbishment: Stack Shelving Improvement	\$12,000
Brick Store Museum, Kennebunk, Maine Building Engagement through Innovation	\$5,000
Bridgton Historical Society, Bridgton, Maine A Fresh Start: Eradicating the Collections Cataloging Backlog	\$10,000
Celebration Barn Theater, South Paris, Maine Repairing the Barn	\$8,000
Center for Painted Wall Preservation, Hallowell, Maine 2020 Conserving Our Painted Past Symposium	\$5,000
Chase Emerson Memorial Library, Deer Isle, Maine Deer Isle Library Interior Upgrade: From Makeshift to Purpose-Built	\$5,000
Children’s Discovery Museum, Augusta, Maine We Are Makers – The Children’s Museum’s Mill MakerSpace Exhibit	\$25,000

Choral Art Society, Portland, Maine Maine Premier Performances of Considering Matthew Shepard	\$5,000
Classical Uprising, Brunswick, Maine Support for Professional Musicians, Oratorio Chorale November 2019 Performance of Handel's Israel in Egypt	\$3,500
Eastport Public Library Association, Eastport, Maine Peavey Library Historic Exterior Restoration Project	\$10,000
Effingham Preservation Society, Effingham, New Hampshire Upper Window Restoration	\$9,750
Falmouth Memorial Library, Falmouth, Maine Becoming a Family Place Library with Inviting Spaces and Flexible Furnishings	\$10,000
Farnsworth Art Museum, Rockland, Maine Farnsworth Art Museum Auditorium – Technology Upgrades	\$20,000
Friends of the Alfred Shaker Museum, Alfred, Maine Outfitting Alfred Shaker Museum's Library/Office	\$4,502
Friends of Congress Square Park, Portland, Maine In the Square Public Arts Programming	\$5,000
Friends of Starling Hall, Fayette, Maine Starling Grange Hall Renovations	\$15,000
Friends of Swan Island, Richmond, Maine Key Infrastructure Improvements	\$10,000
Friends of the DaPonte String Quartet, Damariscotta, Maine Rural Tour 2019	\$10,000
General Henry Knox Museum, Thomaston, Maine Roof Replacement for General Henry Knox Museum, Montpelier	\$15,000
Good Theater, Inc., Cape Elizabeth, Maine Staff Expansion: Hiring a Promotional Director/Volunteer Coordinator Position for 25 Hours Per Week	\$5,000
Great Cranberry Historical Society, Cranberry Island, Maine Completing the Archival Level of the Expansion on Cranberry House	\$10,000
Hancock County Auditorium Associates dba The Grand Theater, Ellsworth, Maine Live Sound System	\$10,000
Historical Society of the Town of Hancock, Hancock, Maine New Museum and Archives Building	\$10,000

Kezar Falls Circulating Library, Parsonsfield, Maine Computer and Technology Project 2019	\$3,965
Lubec Memorial Library, Lubec, Maine Lubec Library into the Technological Future	\$9,451
Mad Horse Theatre Company, South Portland, Maine Lighting Design Improvements	\$6,488
Maine Academy of Modern Music, Portland, Maine Enriching Early Childhood Music Education	\$10,000
Maine Humanities Council, Portland, Maine 2020: Maine's Bicentennial Vision for Past, Present and Future	\$9,500
Maine Jewish Film Festival, Portland, Maine Maine Yiddish Culture Festival	\$3,000
Maine Mineral and Gem Museum, Bethel, Maine MMGM Discovery Gallery: Creating a Curious Community Learning Center	\$25,000
Maine State Library, Augusta, Maine Maine Day by Day Family Literacy Calendar	\$10,000
Maine State Museum, Augusta, Maine Historic Records of Indians of the Far Northeast: A Proposal to Publish Online	\$15,000
Millay House Rockland, Rockland, Maine Rehabilitation of the Interior of the Millay House Rockland	\$20,000
Millinocket Historical Society, Millinocket, Maine 2 nd Floor Construction	\$30,000
Music Hall, Portsmouth, New Hampshire Improving the Infrastructure of The Music Hall's Historic Theater	\$15,000
New England Music Camp Association dba Snow Pond Center for the Arts, Sidney, Maine Renovation of the Historic Bowl in the Pines at Snow Pond Center for the Arts	\$20,000
Old Berwick Historical Society, South Berwick, Maine Old Berwick Historical Society Website Upgrade	\$5,000
Patten Free Library, Bath, Maine Historic Window Preservation	\$10,000
Patten Lumbermen's Museum, Patten, Maine Reconstructing the Lombard Shed	\$20,000

Portland Chamber Music Festival, Portland, Maine Beethoven 2020	\$10,000
Portland Opera Repertory Theatre dba, Opera Maine, Portland, Maine The Magic Flute, Special Exhibition, and celebration of Opera Maine's 25 th Anniversary	\$15,000
Portland Symphony Orchestra, Portland, Maine Purchase of New Celesta for the Portland Symphony Orchestra	\$15,000
Presque Isle Historical Society, Presque Isle, Maine Exterior Repairs to the 1875 Vera Estey House Museum	\$25,000
Public Theatre, Lewiston, Maine Computer Network, Sound and Communications Equipment Upgrade	\$7,000
Quoddy Tides Foundation, Eastport, Maine Saving the Masonic Building & Transforming the Tides Institute and Eastern Maine Coast Region	\$25,000
Rangeley Friends of the Performing Arts, Rangeley, Maine RFA Lakeside Theater Capital Improvement	\$10,000
Readfield Union Meeting House Company, Readfield, Maine Readfield Union Meeting House Trompe L'oeil Ceiling Conservation, Phase 2	\$15,000
River Tree Arts, Kennebunk, Maine Install New Efficient Heating System for Music Classrooms	\$6,500
Sagadahoc Preservation, Inc., Bath, Maine Decorative Paint Analysis in Bath Maine's Winter Street Church	\$2,500
Schoodic Arts for All, Winter Harbor, Maine Schoodic Arts for All Schoolhouse Creative Arts Center Renovations for Community Groups	\$15,000
Seaglass Performing Arts, Kennebunk, Maine The Peacemakers by Karl Jenkins	\$5,000
Seal Bay Festival, Vinalhaven, Maine 2019 Seal Bay Festival Season	\$5,000
Society for the Preservation of New England Antiquities, Boston, Massachusetts Hamilton House Stairhall Restoration and Wallpaper Reproduction	\$20,000
SPACE Gallery, Portland, Maine Upgrades and Upkeep: Addressing Accessibility and Preservation Needs of SPACE's home, the Durant Block Building	\$20,000

Speaking Place, Rockland, Maine Unlocking the Complexity of Passamaquoddy Words for Accelerated Language Learning	\$5,000
Standish Historical Society, Standish, Maine The Future of Our History	\$962
Stanley Museum, Inc., Kingfield, Maine Steps and Side Wall Repair	\$7,000
Tate House Museum, Portland, Maine Tate House Museum Campus Improvements	\$35,000
Telling Room, Portland, Maine 2019-2020 Anthology Project – Theme 2020	\$10,000
The Belfast Maskers, Belfast, Maine The Belfast Maskers – Build the Buzz	\$20,000
The Dance Hall, Kittery, Maine Affordable Arts: All Around the World Series	\$5,000
Theater at Monmouth, Monmouth, Maine Artist Housing Project: The Final Phase of the Renovation of Toad Hall	\$15,000
Town of Alna, Alna, Maine Alna Meetinghouse Restoration Project – Committee for Alna History	\$16,100
Victoria Mansion, Portland, Maine Victoria Mansion Parlor Project	\$15,000
Virginia Project, Inc., Bath, Maine Marine Diesel Propulsion System for the Pinnacle Virginia	\$10,000
Watts Hall Community Players, Thomaston, Maine Watts Hall Acoustic Improvement Project	\$3,306
Wayne Library Association dba Cary Memorial Library, Wayne, Maine Alice in Wonderland Room Preservation and Carriage Barn Renovation Project	\$6,000
Wintergreen Arts Center, Presque Isle, Maine After-School Digital Arts Programming for Middle and High School Students	\$10,000
Woman’s Literary Union of Androscoggin County, Auburn, Maine Foss Mansion Emergency Roof Repairs	\$15,000
Wood Island Life Saving Station Association, Kittery Point, Maine Wood Island Station Restoration, Phase Four	\$25,000

Total Arts and Culture

\$876,962

Education

Aroostook County Action Program, Presque Isle, Maine Spot Vision Screener to Ensure Students Receive the Early Preventative Care They Need	\$9,025
Big Brothers Big Sisters of Southern Maine, Westbrook, Maine “Big Learners”: Targeting At-Risk School-Aged Children to Improve Reading, Social and Language Skills through Mentoring	\$25,000
Boys and Girls Clubs of Southern Maine, Portland, Maine My Great Futures	\$10,000
Capital Kids dba Boys & Girls Club of Augusta, Augusta, Maine Alternative to Suspension: Gardiner Area High School Expansion	\$60,000
Cobscook Community Learning Center, Trescott, Maine Expanding Access: Supporting Cobscook Experiential Program for High School Students in Developing 8 th Grade Curriculum	\$12,500
Colby College, Waterville, Maine Sum Camp: Numeracy through Art and Performance	\$41,224
College of the Atlantic, Bar Harbor, Maine Building Interdisciplinary STEM Capacity: Integrating Robotics and Microcontrollers with Field Research and Data Analysis	\$25,000
Count Me In, Portland, Maine Expanding Capacity Building at Count Me In to Increase Statewide Impact	\$20,000
Educate Maine, Portland, Maine Expanding K-12 Computer Science Education through Individualized District Support	\$10,000
Foundation for Maine’s Community Colleges, South Portland, Maine Northern Maine Community College Integrated Robotics Training and Certification for Degree and Non-Degree Programs	\$72,000
Foundation for Maine’s Community Colleges, South Portland, Maine York County Community College’s Advanced Manufacturing Program Expansion	\$75,000
Foxcroft Academy, Dover-Foxcroft, Maine Foxcroft Academy Indoor Track and Multi-Purpose Field House	\$20,000

Hurricane Island Foundation dba Hurricane Island Center for Science and Learning Rockland, Maine Hurricane Island Field Research Station	\$35,000
Hyde School, Bath, Maine Hyde School STEAM Initiative	\$25,000
iXplore STEM, Yarmouth, Maine Biotechnology Education and Resource Program	\$7,450
Junior Achievement of Maine, Inc., Portland, Maine Preparing Cumberland and York County Low-Income Youth for Tomorrow's Economy	\$25,000
Leaps of Imagination, Rockport, Maine Teaching for the Future: Empowering Kids to Change the Earth	\$8,000
LearningWorks, Portland, Maine Reimagine 181 Brackett	\$25,000
Let's Get Ready, Boston, Massachusetts Let's Get Ready - Maine	\$50,000
Lincoln Academy, Newcastle, Maine Energy Efficient Window Replacement – Main Building and Science Wings	\$30,000
Literacy Volunteers of Bangor, Bangor, Maine Teach One, Reach One: 50 Years of Systemic Change through Community-Building Literacy and Education	\$8,000
Maine Adult Education Association, Dover-Foxcroft, Maine Maine Adult Education Association Website Portal Upgrade Proposal	\$10,000
Maine College of Art, Portland, Maine A New Director/Associate Dean of Graduate and Professional Studies	\$20,000
Maine School Garden Network, Augusta, Maine Growing Our Gardeners : A Collaborative Approach	\$25,000
Maine Youth Leadership, Portland, Maine Maine Youth Leadership Advanced Leadership Program	\$5,000
MapleStone, Acton, Maine The Service to STEM Lab Project: Building Durable Science-Based Learning Through Environmental Stewardship	\$12,989
Oxford Hills Community Education Exchange, South Paris, Maine School Business Partnerships and Community Internship Program	\$3,000
Quinnipiac University, Hamden, Connecticut Rural Immersion at Northern Maine Medical Center, Fort Kent, Maine	\$19,400

Tree Street Youth, Lewiston, Maine	\$30,000
BRANCHES: College Preparation and Future/Career Planning for At-Risk Youth	

Total Education	\$718,588
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Medical

ALS Association Northern New England Chapter, Concord, New Hampshire ALS Association Northern New England Care Giver Lab	\$7,000
American Red Cross of Maine, Portland, Maine Next Generation Blood Drives: Cutting-Edge Scales Improve Efficiency and Safety	\$25,000
Androscoggin Home Care and Hospice, Lewiston, Maine Extending the Impact of Palliative Care Through Nursing Care and Coordination	\$25,000
Community Dental, Falmouth, Maine Technology Upgrades to Reduce Costs and Expand Access to Oral Health Care	\$20,000
Dempsey Centers for Quality Cancer Care, Lewiston, Maine Expanding the Healing Tree Program for Youth and Families in South Portland	\$24,975
Dexter Public Health Association, Dexter, Maine Storage Shed, Update Equipment	\$5,000
Eastport Health Care, Inc., Eastport, Maine Updated Air Compressor and Instrument Sterilizer for EHC Dental	\$12,500
Harrington Family Health Center, Harrington, Maine Pediatric Equipment and Supplies to Support Significant Growth in Pediatrics Patients Served at the HFHC	\$15,000
Hospice of Southern Maine, Scarborough, Maine Home Hospice Care Campaign – New Hospice Center Expands Capacity for Hospice, Especially at Home	\$50,000
LifeFlight Foundation, Camden, Maine LifeFlight: Critical Care Academy	\$25,000
LincolnHealth, Damariscotta, Maine Maternity Department Fetal Monitoring System	\$25,000
MaineGeneral Medical Center, Augusta, Maine MaineGeneral’s Remote Patient Monitoring Program	\$50,000

Northern Light A.R. Gould Hospital, Presque Isle, Maine Improving Access to Care in Rural Northern Maine: Northern Light A.R. Gould Critical Care Ambulance	\$50,000
Northern Light Acadia Healthcare, Inc., Bangor, Maine The Compassionate Care Project: Stress Reduction for Healthcare Workers and Improved Patient Care	\$33,210
Northern Light C.A. Dean Hospital, Greenville, Maine Breaking Point: Hologic Horizon DXA Bone Density Scanner at Northern Light C.A. Dean Hospital	\$30,000
Northern Light Eastern Maine Medical Center, Bangor, Maine Portable Bladder Scanning Technology at Eastern Maine Medical Center	\$10,000
Northern Light Home Care and Hospice, South Portland, Maine Pediatric Home and Palliative Care in Rural Maine	\$30,840
Northern Light Maine Coast Memorial Hospital, Ellsworth, Maine General Surgery Ultrasound Technology Upgrade at Northern Light Maine Coast Hospital	\$10,000
Northern Light Sebecook Valley Hospital, Pittsfield, Maine The Next Generation of Cardiovascular Diagnosis Testing: 3D ECHO Cardiac Ultrasound at Sebecook Valley Hospital	\$25,000
Oxford County Mental Health Services, Rumford, Maine Creating Trauma-Informed Schools in Oxford County	\$25,000
St. Andre Health Care Facility, Biddeford, Maine St. Andre Memory Care Garden	\$20,000
St. Mary's Regional Medical Center, Lewiston, Maine St. Mary's Regional Medical Center – Adult Behavioral Unit Renovation	\$50,000
Woodfords Family Services, Westbrook, Maine Woodfords Family Services Electronic Health Record Transition	\$25,000

Total Medical **\$593,525**

TOTAL GRANTS	\$2,189,075
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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

Staff

Yvonne B. Mummé, Chief Finance and Administrative Officer
Katie T. Howard, Program Officer
Lisa M. Smith, Grants Associate

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