



2021 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
Stefanie Millette, Grants Manager
30 Forest Falls Drive, Suite 5
Yarmouth, ME 04096
Tel: 207 846-9132
www.davisfoundations.org
dff@davisfoundations.org

**Davis Family Foundation
Balance Sheet
December 31, 2021**

Assets

Cash	\$ 55,996
Interest receivable	94,580
Due from related parties, net	49,408
Investments	94,599,541
Prepaid Assets	2,507
Right-of-use asset	131,904
Other assets	<u>816</u>
 Total assets	 <u>\$ 94,934,752</u>

Liabilities and Net Assets

Liabilities	
Accounts payable	\$ 51,351
Lease liability	<u>135,768</u>
Total liabilities	187,119
 Net assets	
Net assets without donor restrictions	 <u>94,747,633</u>
 Total liabilities and net assets	 <u>\$ 94,934,752</u>

Davis Family Foundation
Statement of Activities
Year Ended December 31, 2021

Changes in net assets without donor restrictions

Net return (loss) on investments	<u>\$ 14,526,061</u>
Expenses	
Grantmaking	
Grants, net of grants returned or reduced	\$ 2,467,225
Grant related expenses	<u>148,354</u>
Total grantmaking expenses	2,615,579
General and administrative	<u>89,202</u>
Total expenses	<u>2,704,781</u>
Change in net assets without donor restrictions	11,821,280
Net assets, beginning of year	<u>82,926,353</u>
Net assets, end of year	<u>\$ 94,747,633</u>

**Davis Family Foundation
Grants Made and Payable
During the Year Ended December 31, 2021**

Arts and Culture

A Company of Girls, Portland, ME Arts-Based Empowerment, Leadership & Resiliency Afterschool Programming for Underserved Girls	\$10,000
Acorn Productions, Portland, ME Acorn Productions Expansion of Education Programming Post- pandemic	\$2,500
Androscoggin Historical Society, Auburn, ME Catalog and Organize Storage for Archives and Artifacts not on Display	\$6,000
Aroostook Arts And Education Center DBA Wintergreen Arts Center, Presque Isle, ME Expand After School and Summer Arts Programs to Area Youth Regardless of Ability to Pay	\$20,000
Bangor Symphony Orchestra, Bangor, ME Bangor Symphony Orchestra's 2021-22 Season	\$15,000
Bay Chamber Concerts and Music School, Rockport, ME Bay Chamber Concerts Screen Door Summer Music Festival	\$10,000
Bearnstow, Mount Vernon, ME Year Three of 4-Year Bearnstow Restoration	\$10,000
Bethel Area Arts & Music, Bethel, ME Open Stage for Young Adults	\$5,000
Blue Hill Public Library, Blue Hill, ME The Main Room Project: Adaptability and Design for Community	\$15,000
Boothbay Railway Village, Boothbay, ME Railway Village Archival Building	\$25,000
Brick Store Museum, Kennebunk, ME Infrastructure Upgrades	\$7,125

Center Theatre Inc., Dover Foxcroft, ME Digital Projector Upgrade	\$15,000
Charlotte Hobbs Memorial Library, Lovell, ME Exterior Building Repainting, Main Street Porch & Foundation Stabilization and Repair	\$20,000
Community Library, Lyman, ME Lighting Upgrade to LED Fixtures and Bulbs	\$5,000
Deer Isle-Stonington Historical Society, Deer Isle, ME Renovation and Expansion of Archival Storage Space	\$20,000
Deertrees Foundation Ltd., Harrison Road, ME Light Project	\$10,000
Eastport Public Library Association dba Peavey Memorial Library, Eastport, ME Peavey Library Historic Exterior Restoration Project: Masonry Repointing and Replacement	\$15,000
Farnsworth Art Museum, Rockland, ME Olson House HSR (Historic Structure Report) Project	\$20,000
Fifth Maine Regiment Museum, Peaks Island, ME Fifth Maine Museum (FMM) 2022 Second Floor Window Restoration	\$10,000
Fort Kent Historical Society, Fort Kent, ME Daigle-Dube House foundation, roof, and porches restoration	\$35,000
Friends of Alfred Shaker Museum, Alfred, ME Tree removal and Speaker Series	\$4,700
Friends Of Congress Square Park, Portland, ME 2022 In the Square Programming	\$7,500
Friends of Cumston Hall, Monmouth, ME McCabe Lighting Upgrade	\$10,000
Friends of Soldiers Memorial Library, Hiram, ME Arts Center at 8 Hancock Main Floor Third Exit to Improve Safety and Convenience	\$6,500
Gardiner Library Association, Gardiner, ME Exterior trim painting	\$14,000

General Henry Knox Museum dba Knox Museum, Thomaston, ME The General Henry Knox Museum Window Project	\$20,000
Greenville Junction Depot Friends, Greenville, ME Depot Freight Shed Interior Construction and Remodeling	\$35,000
High Peaks Creative Council, Avon, ME Maine Barn Quilt Trail	\$5,000
Historical Society of Wells and Ogunquit, Wells, ME Meetinghouse Interior Painting & Restore Project	\$13,150
Hubbard Free Library, Hallowell, ME Phase two of the Hubbard Library's energy efficiency improvements	\$29,121
Johnson Hall Inc., Gardiner, ME Renovation of the 1864 Johnson Hall Opera House Theater	\$50,000
Lincolntonville Historical Society, Lincolntonville, ME Beach Schoolhouse Restoration Project: Preserving the Past, Creating Our Future	\$28,200
Lovell Historical Society, Lovell, ME Restoration of the Second Floor of the Lovell Historical Society's Kimball-Stanford House	\$10,000
Mad Horse Theatre Company, South Portland, ME Sound Design Improvements	\$8,463
Maine Academy of Modern Music, Portland, ME Making Music at the Children's Museum and Theater of Maine (CMTM)	\$6,000
Maine Alliance for Arts Education, Augusta, ME Expanding the Pilot: County-wide Group Theater Integration Training for English Teachers in Washington County (WaCo)	\$10,000
Maine Charitable Mechanic Association, Portland, ME Restoration and Repair of the Historic "Clerestory" Roof of Mechanics' Hall, Congress Street's Italianate Landmark.	\$50,000
Maine Film Association, Portland, ME The 2022 MFA Winter Film Challenge	\$3,000
Maine Historical Society, Portland, ME Northern Threads: Two Centuries of Dress at Maine Historical Society	\$15,000

Maine Humanities Council, Portland, ME The Discussion Project	\$7,000
Maine Jewish Film Festival, Portland, ME 2021 Maine Jewish Film Festival	\$5,000
Maine Maritime Museum, Bath, ME "Arthur Beaumont: Art of the Sea" Exhibit	\$5,000
Maine State Music Theatre, Brunswick, ME Dust Collection System for MSMT Shop	\$5,000
Midcoast Youth Theater, Brunswick, ME Midcoast Youth Theater's Return To The Stage!	\$10,000
Millay House Rockland, Rockland, ME Rehabilitation of the South Side of Millay House, a Double House at 198-200 Broadway, Rockland.	\$20,000
Nasson Center Redevelopment, Inc. d.b.a. Nasson Community Center, Springvale, ME Sound and Technical Equipment for Little Theatre	\$9,000
North Yarmouth Historical Society, North Yarmouth, ME Old Town House is Moving Into the Future Capital Campaign	\$25,000
Ogunquit Museum of American Art, Ogunquit, ME Windows to the Future	\$25,000
One Longfellow Square, Portland, ME Paint OLS lobby and venue, adding murals by Portland artist, Rachel Gloria Adams	\$5,000
Opera House Arts, Stonington, ME Expanding our production capabilities with a new modern lighting control console	\$10,000
Opera Maine, Portland, ME The Elixir of Love by Gaetano Donizetti	\$10,000
Porter Memorial Library, Machias, ME Chimney repair	\$15,000
Portland Chamber Music Festival, Portland, ME 2022 Concert Season and Strategic Initiatives	\$12,500

Portland Public Library, Portland, ME Updating the lighting in the Library's Rines Auditorium to serve as a cultural meeting place	\$30,000
Rangeley Friends Of The Performing Arts Inc., Rangeley, ME RFA Lakeside Theater façade and marquee improvement project	\$20,000
Roque Bluffs Community Center, Roque Bluffs, ME Phase IV of the Preservation, Enhancement and Augmented Accessibility (PEAA) Project of RBCC.	\$5,000
Ruggles House Society, Columbia Falls, ME Ruggles House Roof Replacement and Exterior Paint Project	\$9,122
Salt Bay Chamberfest, Damariscotta, ME Doors Open! Salt Bay Chamberfest's 2021 Festival	\$10,000
Schoodic Arts For All, Winter Harbor, ME The New 3Rs at an Old Schoolhouse: Renovations, Resources, and Revenue	\$10,000
Seal Bay Festival, Vinalhaven, ME Seal Bay Festival 2021 concert season	\$3,500
Sorrento Public Library Corporation, Sorrento, ME Sorrento Public Library: Historic Building Renovations	\$10,000
Tate House Museum, Portland, ME Updated Gutter and Downspout System and Improved Drainage at Tate House	\$20,000
Telling Room, Portland, ME Support for the 2021-22 Anthology Project - Theme: MYSTERY	\$15,000
Theater at Monmouth, Monmouth, ME Artist Housing Project: The Renovation of Toad Hall Final Phase	\$20,000
Unity Public Library, Unity, ME The Children's Room at the Unity Public Library	\$15,000
Victoria Mansion, Portland, ME Completing the Principal Façade: Restoring Victoria Mansion's Rooftop Balustrades	\$20,000
Virginia Project, Inc., Bath, ME Virginia Pre-Commissioning Package.	\$10,000

Waterfall Arts, Belfast, ME Glassblowing elective class at Waterfall Arts for BAHs students in the 2021/22 school year.	\$15,000
Waterville Regional Arts and Community Center, Waterville, ME Waterville Downtown Arts Center	\$50,000
Wendell Gilley Museum of Bird Carving, Southwest Hbr, ME Collection Storage Expansion and Renovation	\$20,500
Wesserunett Arts Council, Skowhegan, ME Skowhegan Opera House Revitalization	\$20,000
Western Maine Play Museum, Wilton, ME Western Maine Play Museum Pavillion	\$25,000
Wood Island Life Saving Station Association, Kittery Point, ME Wood Island Station Restoration, Phase Six – “the shortest short haul railway in New England”	\$25,000

Total Arts & Culture **\$1,117,881**

Education

Apex Youth Connection, Biddeford, ME Increasing access to education through mentorship, engagement, and aspirations-building	\$10,301
Boys & Girls Clubs of Southern Maine, Portland, ME Reading Recovery Initiative	\$49,910
Challenger Learning Center of Maine, Bangor, ME Maine Mice in Space	\$25,000
Children's Center Early Intervention And Family Support, Augusta, ME “Champion in EVERY Child” Children's Center Expansion Project	\$100,000
Cobscook Community Learning Center, Trescott TWP, ME Cobscook Experiential Programs: Growth, Equity, Access and Resilience During the Ongoing Pandemic	\$15,000

Hurricane Island Foundation, Rockland, ME Hurricane Island Bunkhouse Sprinkler System Project	\$50,000
Hurricane Island Outward Bound School, Camden, ME The Thriving Classroom: Supporting Students' Social, Emotional, and Academic Growth	\$10,000
Island Readers and Writers: An Initiative for Maine Children, Mount Desert, ME Storytelling through Art and Music	\$3,500
IXplore STEM, Inc., Yarmouth, ME Bio-Technology Education and Resource Program (Bio-Tech Ed)	\$9,675
Jobs for Maine's Graduates, Inc., Augusta, ME JMG's College Success Program in Southern Maine	\$30,000
Lets Get Ready Inc., Boston, MA Let's Get Ready & Southern Maine Community College Success Program Partnership	\$50,000
Literacy Volunteers of Bangor, Bangor, ME Teach One, Reach One: Rebuilding a community-based program in a post-pandemic environment	\$7,000
Maine Mathematics and Science Alliance, Augusta, ME Increasing Equitable Access to STEM Learning in Maine	\$7,500
Sweetser, Saco, ME Sweetser's Curriculum Enrichment Project	\$20,000
The Foundation for Maine's Community Colleges, S Portland, ME Washington County Community College Photovoltaic Panel System for Solar Energy Training	\$60,590
Tree Street Youth, Inc., Lewiston, ME Tree Street Pre-K Bridge Program	\$15,000
Trekkers, Rockland, ME Uplifting the Aspirations of Rural Youth: Direct Youth Mentoring Program	\$15,000
University of New England, Portland, ME Institute for Interprofessional Education and Practice	\$150,000

Total Education

\$628,476

Medical

<p>Androscoggin Home Care and Hospice, Lewiston, ME Identifying High-Risk Mainers with Predictive Analytics Who Would Benefit from Earlier Palliative Care Interventions</p>	<p>\$42,818</p>
<p>Aroostook Mental Health Services, Inc., Presque Isle, ME AMHC Expansion of Residential Adult Crisis Stabilization Unit in Aroostook County</p>	<p>\$100,000</p>
<p>Cedars Nursing Care Center Inc., Portland, ME Expansion of Mindful Connections: A Community-Based Group for Individuals with Early to Moderate Memory Loss</p>	<p>\$10,000</p>
<p>Central Maine Healthcare Corporation, Lewiston, ME CMH Cancer Care Center</p>	<p>\$100,000</p>
<p>Family Planning Association of Maine dba Maine Family Planning, Augusta, ME Primary Care Expansion in Aroostook County</p>	<p>\$20,000</p>
<p>MaineHealth Care at Home, Saco, ME Lifeline Alert Systems for Homebound Hospice Patients</p>	<p>\$17,000</p>
<p>Milestone Foundation, Inc., Portland, ME Remote Recovery Infrastructure</p>	<p>\$10,000</p>
<p>Mount Desert Island Hospital, Bar Harbor, ME Fixed-Place MRI Project</p>	<p>\$50,000</p>
<p>Northern Light A.R. Gould Hospital, Presque Isle, ME Northern Light AR Gould Hospital (NL ARG) Cardiac Telemonitoring Replacement and Expansion</p>	<p>\$50,000</p>
<p>Northern Light Blue Hill Hospital, Bangor, ME Improved Technology for Better Outcomes: Hologic Selenia Dimensions 3-D Mammography Machine for Blue Hill Hospital</p>	<p>\$25,000</p>
<p>Northern Light C.A. Dean Hospital, Greenville, ME Northern Light CA Dean - A Moosehead Legacy: Preserving the Promise</p>	<p>\$75,000</p>
<p>Northern Light Eastern Maine Medical Center, Bangor, ME Complex Outpatient Antimicrobial Therapy Model Pilot Program for Patients Requiring Long-term Antibiotics</p>	<p>\$38,447</p>

Northern Light Health Home Care and Hospice, South Portland, ME Home Telemonitoring for Economically Disadvantaged Mainers	\$40,000
Northern Light Maine Coast Memorial Hospital, Ellsworth, ME Northern Light Maine Coast Hospital Capital Campaign: Building on a Promise	\$50,000
Peninsula Ambulance Corps., Blue Hill, ME Increasing Efficiency, Effectiveness, and Safety of Patients and EMS Personnel	\$16,889
Penobscot Community Health Center, Inc. (PCHC), Bangor, ME Infant Hearing Tests – Enabling Continued Service to Central and Northern Maine	\$22,840
St. Joseph Hospital, Bangor, ME Pinpoint	\$53,710
Wentworth-Douglass Hospital, Dover, NH Enhancing Heart Failure Patients' Care through Life-Saving Remote Monitoring Technology	\$25,000
Total Medical	\$746,704

TOTAL GRANTS	\$2,493,061
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Davis Family Foundation

Trustees

David J. Bucci
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Michael. R. Currie
Samuel M. DiCapua
Edward L. Dilworth III
Colleen Bucci Liddy
Al Noyes
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