



2022 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
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Davis Family Foundation
Balance Sheet
December 31, 2022

Assets

Cash	\$ 63,702
Interest receivable	112,359
Due from related parties, net	38,651
Investments	76,527,526
Prepaid Assets	2,507
Right-of-use asset	102,460
Other assets	<u>828</u>
 Total assets	 <u>\$ 76,848,033</u>

Liabilities and Net Assets

Liabilities	
Accounts payable	\$ 41,942
Lease liability	<u>106,482</u>
Total liabilities	148,424
 Net assets	
Net assets without donor restrictions	<u>76,699,609</u>
 Total liabilities and net assets	 <u>\$ 76,848,033</u>

Davis Family Foundation
Statement of Activities
Year Ended December 31, 2022

Changes in net assets without donor restrictions

Net return (loss) on investments	<u>\$ (14,876,978)</u>
Expenses	
Grantmaking	
Grants, net of grants returned or reduced	\$ 2,942,835
Grant related expenses	<u>133,347</u>
Total grantmaking expenses	3,076,182
General and administration	<u>94,864</u>
Total Expenses	<u>3,171,046</u>
Change in net assets without donor restrictions	(18,048,024)
Net assets, beginning of year	<u>94,747,633</u>
Net assets, end of year	<u>\$ 76,699,609</u>

**Davis Family Foundation
Grants Made and Payable
During the Year Ended December 31, 2022**

Arts and Culture

317 Main St. Community Music Center Inc., Yarmouth, ME Access to Free Music Education for Maine Students	3,000
ArtWaves, Bar Harbor, ME Improving Heat and Ventilation Infrastructure	10,000
Bar Harbor Festival Corporation, Bar Harbor, ME BHMF presents La Bohème Opera Performance and Education Seminar	10,000
Beals Historical Society, Beals, ME Project Stain Heritage Center and Cold Storage Area	1,000
Belfast Maskers, Belfast, ME The Belfast Maskers--Build the Bazz	20,000
Bridgton Historical Society, Bridgton, ME Remediation of the 1869 Bridgton Methodist Church	10,000
Coastal Maine Botanical Gardens, Boothbay, ME Improving Signage to Deepen Learning and Enhance Guest Experience at Coastal Maine Botanical Gardens	20,000
Curran Homestead, Bangor, ME A Carriage Barn; Space for Collections, An Archives, Library, Hands On Learning, & Demos	15,000
Eastport Arts Center, Eastport, ME Eastport Arts Center Workshop Floor Rebuild	11,000
Eddington-Clifton Civic Center, Eddington, ME Addition Foundation Repairs	15,000
Farmington Historical Society, Farmington, ME Phase Two - Titcomb House Museum Expansion: Research Room, Barn and Exterior of Titcomb House	15,000

First Amendment Museum, Augusta, ME Completing the First Amendment Museum (FAM) Permanent Exhibition Design: Prototype Fabrication Stage	15,000
Frances Perkins Center, Newcastle, ME HVAC System Installation at Frances Perkins Homestead National Historic Landmark	25,000
Franco American Heritage Center at St. Mary's DBA Gendron Franco Center, Lewiston, ME Save Our Stones	25,000
Friends of the Kotzschmar Organ Inc, Portland, ME Bach Birthday Bash	5,000
Friends of the St. Lawrence Church, Portland, ME Exterior Project to Address Stone and Woodwork Deterioration, Weather/Water Infiltration and Maintenance	10,000
Gardiner Main Street, Gardiner, ME Saving Lady and the Birds	25,000
Good Theater, Portland, ME You Can't Take it with You, Featuring a Uniquely all-Maine Professional Cast	5,000
Greater Portland Landmarks Inc., Portland, ME Equal Accessibility for the Portland Observatory	7,000
Hancock County Auditorium Associates DBA The Grand Theater, Ellsworth, ME HVAC UPGRADE - Energy Efficient Air Quality	25,000
Heart Of Ellsworth, Ellsworth, ME Water Street Mural Project in Downtown Ellsworth	10,000
Hewnoaks Artist Colony, Portland, ME Wild Light	4,000
Historical Society of Wells and Ogunquit Inc., Wells, ME Historic Meetinghouse Exterior Painting	7,500
Hope Historical Society, Hope, ME Heat Pump Installation	9,000

Illustration Institute, Portland, ME The Great State of Illustration in Maine	5,000
Indigo Arts Alliance, Portland, ME Beautiful Blackbird Children's Book Festival 2023	10,000
Jesup Memorial Library, Bar Harbor, ME Expanding Our Public Library for the Next 100 Years	25,000
Kingfield Pops, Kingfield, ME Reignite Kingfield Pops	7,800
L A Public Theatre Inc., Lewiston, ME Theatrical Drapery, Lighting Console and Safety Upgrades	25,000
Lubec Memorial Library, Lubec, ME Library Community Room Expansion and Digital Upgrade	25,000
Maine Art Gallery Inc., Wiscasset, ME Remediate Water Infiltration into Basement by Repairing Foundation Masonry and Installing an Exterior Perimeter Drain.	15,000
Maine Fiberarts, Topsham, ME The Story of Fiber Art During the Past Half Century as Told by Maine Artists	5,000
Maine Forest & Logging Museum Inc., Bradley, ME 2022 Restoration & Improvement Project	15,000
Maine Forestry Museum, Rangeley, ME 2022 Exhibit Enhancement Project	5,000
Maine Media Workshops & College, Rockport, ME Installation of Acoustic Panels in the Focus Building on Maine Media's Campus in Rockport	15,000
Maine State Ballet, Falmouth, ME Heat Pump Purchase and Installation	7,879
Monhegan Historical & Cultural Museum Association, Monhegan, ME Restoration of the Monhegan Island Light Tower	12,500

Monmouth Museum, Monmouth, ME Blossom House Renovations	6,500
Moosehead Marine Museum, Greenville, ME Keep Kate Cruising Campaign Phase I	25,000
Museum L-A, Lewiston, ME Making Museum L-A's Collection and Education Resources Accessible to Teachers, Students, and the General Public	5,000
New England Suzuki Institute, Portland, ME Digital Pianos for New England Suzuki Institute	9,945
New Surry Repertory Theatre and Acting School Inc., Blue Hill, ME New Surry Theatre Performing Arts School	5,000
Northeast Historic Film, Bucksport, ME Final Phase of Masonry Repairs to Alamo Theatre Building	16,654
Norway Landmarks Preservation Society, Norway, ME Restoring the Gingerbread House	20,000
Penobscot Marine Museum, Searsport, ME Nickels-Colcord-Duncan House Restoration Project - Exterior Paint	15,000
Penobscot Theatre Company, Bangor, ME Bangor Opera House Roof Repair Project	12,000
Pierre Monteux Memorial Foundation, Hancock, ME Music Practice Studios Building Project	15,000
Points North Institute, Camden, ME Funding for production of the Annual All-Documentary Camden International Film Festival and Points North Forum	20,000
Poland Spring Preservation Society, Poland Spring, ME All Souls Chapel Restoration	25,000
Portland Conservatory of Music, Portland, ME Building Harmony Campaign: Phase Two Renovations	25,000
Portland Ovations, Portland, ME Wabanaki Stories	21,500

Portland School Of Ballet DBA Portland Ballet, Portland, ME Sylvia Premiere	8,000
Portland Stage Company Inc., Portland, ME Making an Entrance Capital Campaign - Elevator Upgrade	25,000
Portland Symphony Orchestra, Portland, ME Recording Project: Living Mexican Composers	20,000
Portsmouth Historical Society, Portsmouth, NH Imagine That! The Power of Picture Books	10,000
Presque Isle Air Museum Inc., Presque Isle, ME Presque Isle Air Museum Floor Exhibit Expansion Project	11,496
Quoddy Tides Foundation DBA Tides Institute, Eastport, ME Phase Two: Transforming the Masonic Building, the Tides Institute & Eastern Coast of Maine	25,000
Raymond-Casco Historical Society, Raymond, ME Watkins Blacksmith Shop Project	19,750
Scribner's Mill Preservation, Inc., Harrison, ME Initial Funding to Create Paid Director Position	10,000
Sebago-Long Lake Region Chamber Music Festival Inc., Harrison, ME Healing Through Music: Outreach to Community and Care Centers	6,000
Standish Historical Society (SHS), Standish, ME Exterior Interpretive Sign for Historic Old Red Church, Standish, Maine	4,400
Tear Cap Workshops, Hiram, ME Workshop Space for a luthier	5,000
Tranet DBA WRGY 90.5FM, Rangeley, ME WRGY 90.5FM Broadcast Studio Modernization Project	3,646
United Society of Shakers, New Gloucester, ME Shaker Village Herb House Cultural & Traditional Arts Center	50,000

Waldo Theatre Inc, Waldoboro, ME Maine Fall Fiddle Fest 2022	10,000
Winter Harbor Music Festival, Winter Harbor, ME Winter Harbor Music Festival Community Opera	10,000
Winterport Free Library Association, Winterport, ME Site Work for Installation of Handicap Ramp	10,000

Total Arts & Culture **\$925,570**

Education

Belfast Area Child Care Services Inc., Waldo, ME Belfast Area Child Care Services: Transitional Leadership Development Project	12,000
Capital Kids DBA Augusta Teen Center, Augusta, ME Restorative & Mental Wellness Educational Programs	50,000
Center For Teaching and Learning, Edgecomb, ME Fire-Resistant School Doors	9,900
Colby College, Waterville, ME Equipment/Facilities/Technology Request - Museum Gallery Updates	75,000
College of the Atlantic, Bar Harbor, ME Establishment of a Multidisciplinary Center for Materials Fabrication and Analysis at College of the Atlantic	60,000
Downeast Institute for Applied Marine Research and Education Inc., Beals, ME Let's Find Out - Mobile Marine Libraries for Local Schools	16,500
Ecology Education, Inc. DBA The Ecology School, Saco, ME Expanding The Ecology School's Impact and Innovation through the AgroEcology for Resilient Communities (ARC) Project	14,110
Friends of L.C.Bates Museum, Hinckley, ME Creation of a Connecting Children to Nature Resource Lending Library	6,000

George Stevens Academy, Blue Hill, ME Steelband Instrument Purchase	7,500
Gould Academy, Bethel, ME Increasing Student and Faculty Engagement in Outdoor Education through Investments in Equipment and Infrastructure.	25,000
Great Schools Partnership Inc., Portland, ME Boosting Student Learning & Educator Opportunity: A Maine Opportunity Culture Network	66,906
Junior Achievement of Maine Inc, Portland, ME Breaking the Cycle of Poverty: Financial Literacy and Workforce Readiness for Southern Maine Low-Income Youth	50,000
LearningWorks, Portland, ME LearningWorks YouthBuild (LWYB) Expansion	25,000
Maine School Garden Network, Augusta, ME Working Together to Get Maine Students Learning Outside: A Collaboration between MSGN, MAITC, ReTreeUS	25,000
Midcoast Literacy, Bath, ME Read with Me Family Literacy Project	5,000
Morrison Center, Scarborough, ME Scarborough Children's Residential Project	75,000
North Yarmouth Academy, Yarmouth, ME Educational Technology, Equipment, and Programs in the Multipurpose Room of NYA's Fitness and Wellness Center.	15,000
Northeastern University, Boston, MA Broadening Rural Maine Access to Biotechnology with the Microsoft HoloLens	100,000
Olympia Snowe Women's Leadership Institute, Portland, ME "My Values," "My Voice," and "My Vision" program.	50,000
Rippleffect Inc., Portland, ME Rippleffect Outdoor Center partnership with Portland Public Schools & the City of Portland	50,000

Saint Joseph's College, Standish, ME Developing Maine's First Campus-Based Integrated Studies Program for Students with Intellectual Disabilities	41,349
Side X Side Inc., Portland, ME Building Capacity to Empower Teachers and Students through Arts Integration	45,000
The Foundation for Maine's Community Colleges, S. Portland, ME Maine Connection: Young Men to College and Careers	250,000
Thomas College, Waterville, ME Capacity Building for Campus Mental Health	20,000
University of Maine at Augusta, Augusta, ME Reentry Support Pilot for Justice-Impacted Students	100,000
University of Southern Maine Foundation, Portland, ME Building a Center for the Arts on USM's Portland Campus	50,000
Wayfinder Schools, Camden, ME Passages Program	10,000

Total Education

\$1,254,265

Medical

American Red Cross of Northern New England, Portland, ME Blood Transportation Vehicle	45,000
Amistad, Portland, ME Unhoused Overdose and Infection Initiative	10,000
Calais Community Hospital, Calais, ME Digital Mammography Equipment Replacement	25,000
Fryeburg Rescue Association, Fryeburg, ME Training Equipment- Simulaid Manikins	10,000

Inland Hospital, Waterville, ME Northern Light Inland Hospital Surgical Care	20,000
LifeFlight Foundation, Camden, ME Complete the Fleet—LifeFlight Helicopter Campaign	75,000
Maine Medical Center, Portland, ME Greater Portland Comprehensive Addiction Medicine Program (CAMP) to Treat Individuals with Substance Use Disorder (SUD).	200,000
MaineGeneral Medical Center, Augusta, ME Transport to Treatment: A Picture is Worth a Thousand Words	20,000
Mid Coast Health Net DBA Knox County Health Clinic, Rockland, ME Strategic Planning for a Community Health Center to serve Knox County and Beyond	50,000
Northern Light Acadia Hospital, Bangor, ME Acadia for All: Expanding Access to Mental Health Services for All Mainers	100,000
Northern Light Blue Hill Hospital, Bangor, ME Northern Light Blue Hill Hospital Capital Campaign: The Next Century of Care – Keeping the Promise	50,000
Northern Light Mercy Hospital, Portland, ME Expanding Access to Pediatric Integrated Behavioral Health Services in Maine	100,000
St. Mary's Regional Medical Center, Lewiston, ME Upgrading St. Mary's Regional Medical Center's Blood Bank	13,000
Woodfords Family Services, Westbrook, ME Woodfords' Psychiatric Primary Care Physician (PCP) Consultation Pilot Program	50,000
Total Medical	\$768,000

TOTAL GRANTS

\$2,947,835

Davis Family Foundation

Trustees

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