

Maine Ties

GENERATIONS OF GIVING

For the Dietzes, philanthropy is a family affair.

A couple of times a year some very special people are guided into the conference room at the Maine Community Foundation's Portland office. Charles and William Dietz settle into their chairs and begin to review a set of grant applications. Never mind that Charlie is 13 years old and Will is 11, the Dietz boys take the process as seriously as any donor preparing to make distributions from a fund.

Of course, parents Meg and Brian Dietz have done some background preparation, establishing the budget and narrowing the possibilities. And then the children take it from there. "They get to direct the money where they feel it will be important," says Meg.

Certain organizations get the nod each giving cycle. All involve children. A perennial favorite is the Creek to College program run by the Long Creek Youth Development Center. The boys also want to promote diversity, especially in schools. "They're pretty aware," says Meg. "It's fun to be able to share our sense of values with our kids," Brian adds, "and do it in a way that means that they're taking a real role." There's a third child, Mimi, but she's too young yet to take part in the family's grantmaking.

Meg's parents were Irish immigrants, intent on making it in America. They taught their four kids that if you had family, the chance at a good education, and the opportunity to work hard, you had it all. Through her mother, Meg learned that community involvement was an important part of a successful life, whether it was cleaning up a river or checking on an elderly neighbor. Although they didn't have a lot of money, her parents stressed the importance



The Dietzes enjoy a family moment: (left to right) Charlie, Meg, Brian, Mimi, and Will.

of "sharing the wealth" of opportunity they felt they had been given.

For his part, Brian knows the importance of family through loss. His mother died early—the Ann Schroth Dietz Fund managed by MaineCF is named for her, and it is her estate that forms the bulk of its funds. Even before that, Brian's parents had divorced.

Brian began his career as an editor in the New Haven area and later opened a bookstore in the Old Port section of Portland. As he and Meg were starting a family, he decided to go into financial planning, ultimately launching the partnership, Portland Financial Planning Group. It was this work that drew him to the Maine Community Foundation. Brian knew that a donor-advised fund would be the best

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Jumpstart Our Youth

A new philanthropy program reaches young people across Maine.

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In 2009 the Unity Foundation, in collaboration with the Maine Community Foundation and UniTel, Inc., launched its first youth philanthropy program, Jumpstart Our Youth, or JOY. Delivered through Jobs for Maine's Graduates sites in 64 middle and high schools in Maine, JMG specialists utilized the JOY curriculum to teach young people the importance of complementing hands-on community service learning with smart funding and grantmaking practices.

Drawing on MaineCF's expertise in

youth philanthropy, this collaborative program engaged more than 2,100 students in giving in 2008-2009. The 2010 program is already well under way.

"Learning how to give 'smart money' will teach our next generation of nonprofit and community leaders and donors how to package their compassion, skills, and funds to solve local problems," said Larry Sterrs, Unity Foundation CEO and chairman.

Visit www.jumpstartouryouth.org for more information and to read the students' stories.

Hawa Mohamud, Pat Darling, and Chelsea Villetta, students at Deering High School, created symbolic shoe pieces for an exhibition meant to educate their peers about teen dating violence. "Walking in Their Shoes" was organized by the Young Adult Abuse Prevention Program, which received a grant from Jumpstart Our Youth.



Photo Robyn Fink

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vehicle to assist the family in choosing their giving options.

Meg, a nurse by training, is grateful for the foundation's ability to help them understand what the needs are in the state, and to find institutions such as Opportunity Farm in New Gloucester, which takes in children from troubled homes, ensuring that they get through high school while continuing to work with the family.

For the Dietzes, whose abiding concern with family begins with their own, Opportunity Farm is a perfect fit for their philanthropy. At the same time, Meg and Brian are delighted that through the Ann Schroth Dietz Fund at the Maine Community Foundation, their children can gain the tools, along with some direction, to go beyond being thankful for what they have—to actually reach out and help others.

Embracing Our Own Diversity

How will Maine achieve “business as usual” in racial equity?

In celebration of the Martin Luther King, Jr., holiday, my husband, Dana, and I played host to daughter Becka who, along with her husband, Ché, and their two children, came to visit us in Belfast from their home in Newton, Massachusetts.

Raised in reasonably rural Maine, Becka sometimes longs for the tranquility of country life, the friendliness of Maine towns, and the absence of angry traffic. Yet she and Ché also love being a stone’s throw from the T and relish the arts, culture, sports, and diversity the Boston area offers. Their son’s second grade class includes children whose parents hail from Colombia, Russia, China, inner city Boston, and other places near and far; and the students’ names at the college where Becka works suggest origins far from New England.

If our state is to succeed over the long term, we will need to embrace our own diversity and others whose skin color, ethnicity, sexual orientation, and experiences reflect the world outside our borders.

While the holiday visit included more than a bit of sledding, it also consisted of conversations about Newton. Becka described an informal community network created to organize contributions of nightly meals for a young mother whose husband recently died. She and Ché also discussed the recent election of Newton’s first



Photo Carl Little

This past fall, MaineCF founding President Edward Kaelber stopped by to talk about philanthropy and pose for a photograph with MaineCF President Meredith Jones. The painting behind them, by Jane Dahmen, is part of a revolving showcase of works by Maine artists on display at MaineCF’s Ellsworth office.

African-American mayor, Setti Warren.

A few days earlier, NPR’s Tovia Smith had highlighted the historic significance of Warren’s election. Newton had become the first U.S. city with a popularly elected black mayor, governor, and President. As Smith reported:

[Setti Warren] says it was extremely emotional to be sworn into office alongside his young daughter and his parents, who are part of a generation that still had to fight for the right to vote.

“You know, my father marched in the civil rights movement. Jim Crow was prevalent across the country. And to go from that to having my daughter’s generation have three African-Americans [in office] — mayor, governor and president,” Warren says. “I mean, that’s all she’s ever going to know! It’s just business as usual. I’m awed by it.”

I, too, marched in the civil rights movement and am heartened by the nation’s progress in achieving greater racial equity, but we in Maine have a long way to go before being able to claim that any of our achievements toward racial equity are “business as usual.” If our state is to succeed over the long term, we will need to embrace our own diversity and others whose skin color, ethnicity, sexual orientation, and experiences reflect the world outside our borders.

This column was adopted from a January 20, 2010, posting by MaineCF President and CEO Meredith Jones on “Real Time: A MaineCF Community-Building Blog.” Other blogs by Jones and fellow staff can be found at www.mainecef.org.

Making an Impact

According to a recent report on public perceptions of philanthropy, more than 90% of press related to giving focuses on financial transactions: grants awarded and funds received. The impact of charitable giving receives much less notice in the media.

Why focus on impact? "If we are able to do a better job in communicating our impact with leaders in government, business, the nonprofit sector, and the media," MaineCF President and CEO Meredith Jones wrote in a blog this winter, "it will help us build support, take programs to scale, invite new ideas, and encourage more philanthropy."

The Kneading Conference: Mainers Baking Bread

The idea for the Kneading Conference began with a group of Skowhegan residents, oven builders, millers, and bakers, who were motivated by the critical need to address wheat production in light of a growing local food movement. The first conference was held in July 2007 in the heart of Somerset County, where wheat production fed over 100,000 people annually in the mid-1800s.

Since that gathering, the Kneading Conference, working with Heart of Maine Resource Conservation and Development, has expanded its programming. In 2009, they launched the first annual Maine Artisan Bread Fair, free to the public. About 700 people sampled bread from wood-fired ovens, talked to professional bakers, and purchased baking books and tools and Maine foods.

This year, the conference and fair will relocate to the Skowhegan State Fairgrounds, the oldest continually operating agricultural fairgrounds in the U.S. Partnering with Borealis Breads and FARMS (Focus on Farms in Rural Maine Schools), the conference hopes to teach 1,000 school children about making wholesome bread from Maine-grown grains. Two MaineCF grants, from the Western Mountains Fund and an anonymous donor, have supported the conference and its programs, including grain production workshops, seed trials, and farmer scholarships.



Young bakers take part in the "Pizza with Kids!" workshop at the 2009 Kneading Conference taught by Stu Silverstein, a filmmaker (Dead River Rough Cut), author, and earth oven builder from Waterville. The aprons were handmade by Nancy Kerner of Brunswick.

Photo courtesy the Kneading Conference

The impact of MaineCF grants manifests itself in both short-term and long-term ways and on various levels: individual, organizational, community, and state.

Finding Craft and Confidence

Carrie Jones was in search of better writing skills when she won a MaineCF Martin Dibner writing fellowship in 2006. A Bates College graduate, she enrolled in the MFA writing program at Vermont College. She had been an editor and reporter for several papers in the Ellsworth area, where she lives, and had received an honorable mention for fiction in the PEN New England/Children's Book Caucus Discovery Night.

Fast-forwarding five years, Jones is on a national book tour for her latest young adult novel, *Captive*, her second book to make the *New York Times*' bestseller list in the "Children's Books—Chapter Books" category. E-mailing from a book signing at Copperfield's Books in Petaluma, California, the author said the Dibner Award "not only allowed me to pursue a formal education in the craft of writing, it also gave me confidence that my dream [of being a published author] could become something real."

Jones's characters are sometimes involved with Amnesty International, an organization in which the author has participated. Discussing this fact in a 2008 interview, she cited a desire that her heroines care about more than "boys and clothes." In addition, her books often feature small close-knit communities, inspired by her life in Maine.



Photo courtesy Bloomsbury Publishing

Carrie Jones kayaks on the Maine coast.

For further information about public impressions of philanthropy and its impact, read "High Expectations, High Opportunity," a report of the Philanthropy Awareness Initiative, at www.philanthropyawareness.org.

Adventures in Marine Science

In 2006, the Gulf of Maine Research Institute (GMRI) launched LabVenture! to provide universal access to innovative science education programming for 5th- and 6th-grade classes from every county in Maine. Students travel to the Cohen Center for Interactive Learning, a technology-rich learning environment in the GMRI lab, where they investigate a mystery about the Gulf of Maine ecosystem. During their visit, they assume the role of scientist, conducting their own hands-on research. This year, students are exploring lobster ecology and management issues.

Each visit opens with a large-screen, Google Earth fly-in that zooms in from space to take students on a virtual trip from their own schoolyard down the watershed to the Gulf of Maine. Students learn what makes the Gulf of Maine bioregion unique and the work that scientists are doing to better understand it. They conduct scientific investigations at hands-on research stations and then present their findings in a science colloquium.

GMRI's goal is to ensure that the doors of science are open for every Maine child regardless of their personal circumstances. LabVenture! helps them build skills to engage with environmental and technology challenges, think critically about new ideas and policy decisions, and compete successfully in a global economy.

As many as 80 students per day examine a live lobster's adaptations for defense and migration. LabVenture! has received support from a number of MaineCF county funds.



Courtesy Gulf of Maine Research Institute

Turning Real Estate into Charitable Assets

A Conversation with Joe Wishcamper

As founder and first president of the Maine Real Estate Development Association, Lyndel "Joe" Wishcamper has had extensive experience in the field. In recent years he has worked with MaineCF on several occasions to convert properties into charitable funds. Director of Philanthropic Services Jennifer Southard sat down with Wishcamper to discuss the philanthropic potential of real estate.

MaineCF: How did you first learn about the Maine Community Foundation?

Joe Wishcamper: I was introduced to the foundation through my wife, Carol, who was serving on the board at the time. I remember going to an event at Betty Noyce's house in Bremen. I didn't really know what the organization was and it was still very small (MaineCF's assets were around \$10-15 million back then).

MaineCF: Why did you consider giving gifts of real estate instead of other assets?

Wishcamper: My wife and I had decided to make a commitment to charitable giving. We learned that creating a donor-advised fund at MaineCF and funding it with a large initial gift would allow us to take a charitable deduction for the full amount of the contribution in the year we made it. We would also gain the flexibility to direct grants to charities of our choice. We found this very appealing.

The Maine Community Foundation accepts gifts of real estate and other unique gifts. For more information, visit www.mainecf.org or contact Jennifer Southard, director of philanthropic services, at 877-700-6800.



Lyndel J. Wishcamper, of Freeport, is manager and president of The Wishcamper Companies, Inc., in Portland. A graduate of Yale University and Harvard Law School, he has been engaged in real estate development for the past 40 years. He is chair of the Board of Trustees of the University of Maine System and serves on the boards of the Maine Medical Center and The Nature Conservancy (Maine chapter). In 2004 he and his wife were honored as the Spurwink Institute Humanitarians of the Year.

We considered several options for funding our donor-advised fund: with cash, receiving a standard tax deduction; giving appreciated securities, where we would receive a deduction for their appreciated value; or gifting investment real estate, where we would receive a deduction for the appreciated value of the property and the added benefit of avoiding the deferred tax liability created by the depreciation deductions we had taken. We've now made two real estate gifts to MaineCF.

MaineCF: What should others know before they consider a gift of real estate?

Wishcamper: Here are a few key points to keep in mind:

- Be aware that MaineCF has to be careful about what it accepts since the foundation doesn't want to take property that requires a financial investment to make it saleable.
- Get to know MaineCF's real estate gift criteria, such as whether the foundation will accept properties with debt.

- Consider your tax basis for the property. If you have a negative tax basis in the property and expect to pay a large tax if you sell the property, then it might be a good time to consider a charitable gift.
- Review your tax situation. Most taxes paid on real estate fall under the 15% capital gains rate, but the rate is 25% on gains arising from the reduction in your tax basis from depreciation you have taken.
- If you are a Maine resident and the property is located outside of Maine, you should determine whether your donation will entitle you to a state tax deduction as well. Basically, the more taxes the sale of your property is subject to, the more incentive there is for you to give it away.
- Review all considerations to determine whether the property has reached the point where you should dispose of it, including refinancing, changes in your family situation, and/or your age and retirement plans.

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Stand Up and Be Counted

To magnify his philanthropy, a MaineCF donor turns to challenges.

The vision began at a conference several years ago. A director from The Trust for Public Land described the successful use of state and local bond issues to fund permanent land conservation. Then a representative of the Pew Charitable Trusts highlighted an innovative challenge grant program: When a donor contributes to conserve a threatened land parcel, Pew adds 20 percent.

“Why can’t challenge grants be directed toward conservation bond issues?” thought

a MaineCF donor committed to conserving land in Maine. In that moment the Stand Up and Be Counted Fund was conceived.

The first fruits of this new model of philanthropy were realized this past November when the citizens of Scarborough, inspired by a \$200,000 challenge grant from the fund, voted to support a \$1 million bond issue to acquire and conserve land in this southern Maine town. Six weeks later, residents of the downeast village of Sullivan voted to purchase Gordon’s Wharf

on Taunton Bay to provide permanent public water access. Again, a challenge grant from the MaineCF donor supported the purchase, with larger contributions from the Frenchman Bay Conservancy and Land for Maine’s Future providing the balance.

Many conservation grants are related to people protecting their own view. In this case, the donor had only passed through Scarborough and had never set foot in Sullivan. The grants weren’t about him, but rather about “rewarding long-term vision.” What is more, says the donor, a town that has spent its own money on conservation will be “a greater defender” of its land than if it were simply given to them. “In tough economic times,” he adds, “people who stand up and are counted deserve recognition and support.”

Motivated by these successes, the anonymous MaineCF donor hopes to promote this new way of bringing about change. “I hope this funding example can serve as a model for other donors who want to support land conservation or other public goods that will benefit the community in perpetuity.”

The Stand Up and Be Counted Fund seeks to support other land conservation town bond issues in Maine. For more information, contact Meredith Jones at the Maine Community Foundation.



Photo Letitia Baldwin, courtesy The Ellsworth American

The town of Sullivan recently purchased Gordon’s Wharf to provide permanent public water access to Taunton Bay.

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MaineCF: How did the process work from your perspective?

Wishcamper: I contacted MaineCF and we each had our legal counsel review the situation. Then I gifted the property to the foundation, which entered into a purchase-and-sale agreement with a buyer. The proceeds were used to create a donor-advised fund, providing us with a tax deduction in the year we needed it. Several years later, I

made a second gift of investment real estate to the foundation. These gifts have made it possible for us to make a large number of grants to nonprofits through our donor-advised fund.

MaineCF: Any cautionary notes?

Wishcamper: MaineCF needs to be very selective in the properties it accepts, given the limited liquidity of real estate relative to

other assets such as marketable securities. In all likelihood, MaineCF will want to have identified a potential purchaser for the property before it commits to the transaction. However, you cannot donate a property that is already under contract. If you are in talks with a potential buyer to sell a property and are interested in involving MaineCF, you must be sure not to sign any contracts to sell the property.



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Scholarship Season 2010

A Major New Scholarship for Washington County Students

Through an anonymous donor, the Boston Foundation is making a 10-year commitment to support Washington County students seeking to further their education beyond high school. The Maine Community Foundation will administer the new Downeast Scholarship Fund, which

will meet a major portion of the students' financial need.

"We turned to the Maine Community Foundation because of their distinguished work in scholarship management in Maine," said David Trueblood, a Boston Foundation spokesperson. "We are grateful to have a partner to help fulfill the vision of a donor committed to education in Washington County."

MaineCF President and CEO Meredith Jones praised the collaboration. "The Downeast Scholarship Fund will have a significant impact on the educational aspirations of students in Washington County."

The fund will begin awarding scholarships this spring. In the early stages, a minimum of 10 new scholarships will be awarded annually. Applications and guidelines for this and many other scholarships can be found in the "For Students" section of the MaineCF website, www.mainecef.org.

"The Downeast Scholarship Fund will have a significant impact on the educational aspirations of students in Washington County."



Photo courtesy Micki Cota

Jeremy Cota, a two-time recipient of a Daniel Cardillo Scholarship, became a member of the U.S. Ski Team in freestyle skiing this past fall. He will be competing in World Cup competition this winter. Established in 1999, the Cardillo Charitable Fund at MaineCF supports young people pursuing artistic, academic, athletic, and other passions outside of the traditional school environment. The fund honors the memory of Daniel Cardillo, a junior Olympic skier and a gifted artist.