

# Maine Ties

## GOOD WORK IS THEIR MISSION

### Bill and Patty Zimmerman bring a life of philanthropy to their home on Peaks Island.

When Bill and Patty Zimmerman moved to Peaks Island in 1999, they carried more than their love of Maine and the water. They bore a driving belief in communities helping themselves.

Although the couple met in Maine—at the summit of Mount Katahdin—they began their lives together in Pennsylvania. Each of them knew the importance of giving back. Patty came from a family involved in community activities in western Massachusetts. Bill’s family included volunteers active in local civic organizations, schools, and hospitals. Bill himself helped revive the York County Community Foundation, which grew from \$400,000 in assets to \$5 million in less than three years, and to \$80 million in 15.

After living in Pennsylvania for 25 years, the Zimmermans decided to return to Maine, settling into the close-knit Peaks Island community. Bill’s prior community foundation experience led him to look into launching a similar organization in his new home. In the weekly *Island Times*, he wrote: “The purpose of the Peaks Island Fund is...to give all Peaks Island lovers an opportunity to establish a permanent fund to support the community beyond our time here. That is what endowment really means to Peaks, a lasting perpetual source of funds from folks who have enjoyed this wonderful place for many different reasons.”

In pursuing this idea, the Zimmermans came to the conclusion that it was too expensive to set up a private foundation on a



Bill and Patty Zimmerman

*“Ordinary citizens who embrace well-reasoned change accomplish the most extraordinary good works.”*

local level. “The beauty of the Maine Community Foundation,” Bill notes, “is that it provides great administrative support, along with investment management. The Peaks Island Fund, which is tiny in relation to the foundation, benefits from some of the best minds in the state.” The partnership has allowed the Peaks Island

(continued on page 2)

## In This Issue

<b>The Art of Recycling</b>	<b>2</b>
<b>President’s Page: David Becker and the Equity Fund</b>	<b>3</b>
<b>Making an Impact: Spotlight on Leadership</b>	<b>4-5</b>
<b>Keeping the Conversation Going: Financial Advisor J.B. Sullivan</b>	<b>6</b>
<b>Endowing Scholarships</b>	<b>7</b>
<b>Scholarship Season: Montgomery, Musgrave, and More</b>	<b>8</b>

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ZIMMERMAN continued from page 1

Fund's advisors, all islanders, to concentrate on their essential mission: encouraging donations and distributing grants.

The Peaks Island Fund annual meeting is open to the public. Says Patty, "When the advisors award grants, for after-school and summer programs, a garden for senior citizens, or a solar trash compactor to reduce island waste, the whole community is there. It's gotten to be a wonderful event."

The Zimmermans also have a donor-advised fund at the community foundation through which they contribute to organizations they believe offer the greatest support to the community. That

fund focuses on Peaks Island, Casco Bay, Portland, and some statewide initiatives, in that order.

Ultimately, Bill and Patty Zimmerman believe in giving back to the community as a means of sustaining and promoting opportunities for all. As they wrote in a note to the community foundation, "Ordinary citizens who embrace well-reasoned change accomplish the most extraordinary good works." They speak from experience: good work is their mission.

Read other stories about giving in the "For Donors" section at [www.maineef.org](http://www.maineef.org).

# The Art of Recycling

The Peaks Island Environmental Action Team, or PEAT, under the aegis of the Fifth Maine Regiment Museum, is committed to creating a healthier, greener island. To this end, they recently purchased recycling barrels to place next to public garbage

containers to eliminate cans and bottles from the regular trash. To draw attention to these new receptacles, PEAT invited island artists to design or decorate them. The project received support from the Peaks Island Fund.

Trash bins by Paul Brahms (left) and Nancy Gibson-Nash (right). The latter used rope found on the shores of Peaks Island.



Photo courtesy PEAT Chair Mary Anne Mitchell and Paul Brahms ([www.paulbrahms.com](http://www.paulbrahms.com))



Photo courtesy Nancy Gibson-Nash ([www.nancygibsonnash.com](http://www.nancygibsonnash.com))

# The Maine Equity Fund: An Anniversary and a Tribute

David Becker brought personal passion to his fight for social justice.

**I have been thinking about the impact one person can have on the lives of Mainers.**

I have been thinking about David Becker.

As a member of the community foundation's Board of Directors, David was an advocate for the creation of a fund to support lesbian, gay, bisexual, transgender, and queer (LGBTQ) communities. His leadership led to the creation of the Maine Equity Fund 15 years ago.

*As a member of the community foundation board, David encouraged us to take risks.*

*"If 10 percent of our grants don't fail, we're not doing our job," he'd say.*

For years, the Equity Fund's grant budget was modest in spite of its supporters' mighty ambitions. Today, the fund boasts more than \$1 million in assets, and the advisory committee annually awards around \$40,000 for LGBTQ programs across the state.

David would be the first to say the credit for the fund's success goes to many: early fundraising efforts of community foundation board members; the advisors who make great grants; the trustees of the River Rock Foundation, whose generosity made long-lived aspirations a reality; and the LGBTQ organizations that are making the world a better place for all Mainers.

Yet David was there at the beginning,



Photo Sara Goldenthal

David Becker (1947-2010) helped found the Equity Fund at the Maine Community Foundation.

at a time when LGBTQ issues were less mainstream. His support for the Equity Fund was steadfast: he recruited advisors, reminded his friends in national foundations that Maine's efforts were deserving of their support, and was always among the first to thank staff and volunteers for their dedication.

As a member of the community foundation board, David encouraged us to take risks. "If 10 percent of our grants don't fail, we're not doing our job," he'd say. He knew that some of the riskiest projects

sometimes achieved the best results. His counsel lives on in the work of the foundation today.

*By Meredith Jones, President & CEO*

*This column incorporates parts of a Real Time Community Building blog post and remarks delivered at David Becker's memorial service on December 11, 2010.*

*To learn more about the Equity Fund, visit the "For Nonprofits" section of [www.maineef.org](http://www.maineef.org).*

# Making an Impact: Leadership

*Philanthropy's impact reveals itself in many ways: lives changed, organizations strengthened, communities made more vibrant and prosperous. By supporting leadership programs in Maine, the community foundation and its donors seek to empower citizens to bring about positive change in their communities.*

*Why highlight impact? "If we are able to better communicate the results of our grantmaking," Maine Community Foundation President Meredith Jones states, "we will be able to build support, increase the reach of programs, invite new ideas, and inspire more philanthropy."*

## Community Changemaker

**An ENCorps graduate connects leadership with taking responsibility.**

When she signed up for the Encore Leadership Corps (ENCorps) training last April, Phyllis vonHerrlich was already an active volunteer, but she was taken by the call for Mainers to work on programs to support "livable communities for all ages." An advocate for smart growth, vonHerrlich hoped the program might help her become a stronger voice for "smarter" growth.

The ENCorps experience increased vonHerrlich's knowledge and networks. Through relationships formed during the training, she was recruited by the Augusta Downtown Alliance, a group focused on economic revitalization. VonHerrlich also embraced the idea of leadership: she serves as co-chair of the Alliance's Design Committee and as liaison between the program and the Augusta Historic Preservation Commission. "Those of us in the 'over 50' generations are largely responsible for the current state of the world," vonHerrlich states. "We need to take responsibility for our actions and try to change."

*ENCorps, a program of the Maine Center on Aging and the community foundation, will be hosting a second statewide training in June. For information, contact Lelia DeAndrade, director of grantmaking services, at (877) 700-6800.*



*"We need to take responsibility for our actions and try to change."*

*Phyllis vonHerrlich and Stacy Gervais discuss the importance of enhancing the visual experience of downtown Augusta. They volunteer for the Augusta Downtown Alliance.*

*Photo courtesy Phyllis vonHerrlich*



## Learning Leadership

Leadership training in Maine includes such flagship programs as the Maine Development Foundation's Leadership Maine (now in its 18th year) and the Institute for Civic Leadership, which recently graduated its first class of "Young Emerging Leaders." The Maine Association for Nonprofits (MANP) offers a number of programs through its Nonprofit Leadership Institute. MANP and Colby College will co-host the third annual leadership conference, "Building Movements: Food as a Metaphor for Systems Change," on April 6 and 7.

There are also a number of regional programs, including the Washington County Leadership Institute, a project of the Sunrise County Economic Council, which received the community foundation's 2009 Noyce Award for Nonprofit Excellence. The 2010 Noyce Award went to another leader-building organization, Seeds of Peace, for its Maine Seeds Youth Leadership Program.

*Maine Community Foundation Board Chair Anne Jackson (second from left) and President Meredith Jones (in front) join Tim Wilson (center), creator of the Maine Seeds Program, and Seeds of Peace staff, board, and students on the stage of USM's Abromson Center during the foundation's Inspiring Philanthropy event.*

Photo Samantha DePoy-Warren

## Fishermen of the Roundtable

A leadership program sees far into the future of Maine fisheries.

"There is no substitute for fishermen's leadership in fisheries," says Robin Alden, executive director of the Penobscot East Resource Center in Stonington," adding, "Their local knowledge and community values are key to the future of fishing in Maine." To help strengthen their voice, the Center launched the Community Fisheries Action Roundtable, or C-FAR, a year-round leadership program for fishermen in eastern Maine.

The Roundtable covers basic fisheries management concepts, teaches communications skills, and provides a civics refresher. "The C-FAR acronym wordplay is intentional," Alden notes. "Developing the concept of community-based responsibility for fisheries is a long-term process of cultural change, in fishing communities and in Augusta and Washington. We need to 'see far.'" The C-FAR program has received support from the Belvedere Fund at the Maine Community Foundation.

*Fisherman Rick Trundy and his wife, Janet, listen as facilitator Deb Burwell takes notes during a C-FAR meeting. Burwell is a founder and partner in Paddling the Rapids, a leadership development program for nonprofits in Maine.*



Photo courtesy Penobscot East Resource Center

# Keeping the Conversation Going

Over time, says financial advisor J.B. Sullivan, individual circumstances change.

*As a principal at Portland Global Advisors, J.B. Sullivan is aware of the importance of listening to his clients—and recognizing that the conversation around philanthropy is often long-term. Speaking with Jennifer Southard, director of philanthropic services at the Maine Community Foundation, Sullivan touches on recent trends in the way people think about giving and the importance of change.*



J.B. Sullivan Photo Samantha DePoy-Warren

## Business Partners in Philanthropy

*Portland Global Advisors was among the first members of the community foundation's Business Partners program. As J.B. Sullivan notes, "The firm felt the Maine Community Foundation could help us leverage our financial commitment to nonprofits." Today a variety of businesses, from Sunday River to Mainebiz, are partnering with the foundation to provide resources for Maine nonprofits and students.*

*A complete list of business partners can be found at [www.mainecef.org](http://www.mainecef.org).*

**Jennifer Southard:** We recently held a focus group with professional advisors. Would you talk a bit about some of the ideas discussed there?

**J.B. Sullivan:** As financial advisors, our job is to help individuals and families manage their wealth, so we try to engage clients in a broad conversation about what's important to them. It was clear [from the focus group] that a lot of advisors are thinking about the same thing: the importance of engaging people in the concept of charitable giving.

**MaineCF:** Are there ways that have worked well to prompt that conversation?

**Sullivan:** We try to ask relevant questions, particularly with new clients as we try to get to know them. And you've got to keep engaging them in that conversation because things change—in the market, in their world view, or health situation. Three or four years from now they might be ready to explore different opportunities in philanthropy. We can't know that unless we're talking to them—and listening.

**MaineCF:** Have you noticed any trends or emerging issues?

**Sullivan:** I've seen a real change in the last few years. Financial stress has led many clients to think about their giving in a different way, including how they invest their dollars. People want to understand more intimately what's happening at an organization to which they're thinking of giving money.

**MaineCF:** Would you talk about your relationship with the community foundation and what it has meant to you?

**Sullivan:** I grew up in Freeport and have had a business in Portland for many years, so my world view has been more or less centered on southern Maine. The foundation board retreats were eye-opening: spending several days in communities like Limestone or Eastport and finding out

*"A great trait of the community foundation has been its willingness to change. It's not a static place. There has always been that culture to challenge the conventional way of doing things."*

what's going on, both the progress and the struggles.

**MaineCF:** You serve on the community foundation's Investment Committee. Any thoughts on that aspect of our work?

**Sullivan:** As good as the community foundation's investment performance has been, I don't think that is why people should turn to you. What sets you apart is the knowledge of communities, the Maine connection, the "Buy Local" philosophy. The community foundation can make that connection between a donor with a specific interest and a nonprofit that's doing really cool things in that field.

A great trait of the community foundation has been its willingness to change. It's not a static place. There has always been that culture to challenge the conventional way of doing things.

*J.B. Sullivan is a founder of Portland Global Advisors; prior to that, he was vice president of Lehman Brothers in New York. He served on the Maine Community Foundation's Board of Directors for nine years and is a longtime member of its Investment Committee. He is currently a trustee of the Gulf of Maine Research Center and a member of the investment committee at the Elmina B. Sewall Foundation. A graduate of Amherst College, Sullivan lives in Yarmouth with his wife, Wendy, and their four children.*

# Endowing Scholarships

A community college and a community foundation partner for education.

*It has been 18 years since the Piscataquis Regional YMCA transferred its endowment to the Maine Community Foundation. Since then, that fund has been joined by nearly 150 others, set up by libraries, historical societies, land trusts, local municipalities, schools, social service agencies, and other nonprofits seeking the investment and administrative advantages the community foundation offers.*

*Among those partnering organizations is the York County Community College Foundation, which has established 12 funds at the community foundation since 2002. In a recent interview, the foundation's executive director, John Rainone, discussed the partnership and its impact on students at the community college.*

**MaineCF:** Why did the York County Community College Foundation turn to the Maine Community Foundation to manage its scholarship funds?

*Offering more than 20 different programs, York County Community College has become one of the fastest growing colleges in the country for institutions under 2,500 students.*

**John Rainone:** Several years ago, I received a recommendation from one of our donors regarding the work being done by the community foundation. Reviewing the foundation's impressive investment performance, we were convinced this would be a great way to steward our donors' funds.

**MaineCF:** How has this partnership been beneficial to your work?

**Rainone:** Having a very small staff, it was important that the arrangement be almost turn-key. Your reports allow us to manage our scholarships and other endowments on a quarterly and yearly basis.

**MaineCF:** Would you highlight one of your scholarships?

**Rainone:** The funds under community foundation management represent individuals and corporations that have committed to the York County Community

College through endowed scholarships that are available to more than 50 students each year. Our largest fund was set up by a York County couple who felt that having an opportunity to go to college would change students' lives and the lives of their families. Their \$100,000 scholarship supports students enrolled in our nursing program.

*During 2010, Maine Community Foundation welcomed 15 new nonprofits to its endowment program. These partners include Kittery Land Trust, Pembroke Historical Society, Robert A. Frost Memorial Library, Camden Area District Nursing Association, and the Penobscot East Resource Center. A complete list of nonprofit endowments can be found at [www.maineef.org](http://www.maineef.org).*

*To learn more about nonprofit endowments at the Maine Community Foundation, contact Liana Kingsbury, senior program officer, at (877) 700-6800.*



Photo courtesy York County Community College



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## Scholarship Season

### APPLY YOURSELF

New resources help students navigate the world of scholarships and access education

With scholarship season under way, students across Maine are searching for sources of financial support for their education. The Maine Community Foundation manages more than 400 individual scholarships, many of them focused on higher education. And we're adding new ones every year (19 in 2010).

The scholarship section at [www.mainecef.org](http://www.mainecef.org) features new resources for students, including a financial aid library and a step-by-step guide for putting together an application.



Photo Stacey Damon

*Sarah Hinkley (left) and her daughter, Gabrielle, from Kingfield, Maine, attend a technical writing class at Mt. Abram High School. Sarah is a Montgomery Scholarship recipient; Gabrielle is a College for ME student. Classes are made available through the Franklin County Community College Network.*

# Montgomery and Musgrave: Legacies of Education

**Elizabeth and Hugh Montgomery** had roots in Phillips, Maine. Betty was born and attended schools there and Hugh summered in the old farmhouse that belonged to his family. After college—Betty attended Simmons, Hugh, Harvard—they pursued careers as librarians. On the advice of their financial advisor, Hugh and Betty named the community foundation in a bequest. Following their deaths, in 1999 and 2005 respectively, a scholarship fund was established in their names that supports adult learners in Franklin County returning

to school at the post-secondary level.

Managed by the Franklin County Community College, the renewable Montgomery Scholarship is being supplemented by the Musgrave Scholarship Fund, a discretionary fund established through the will of Thomas and Beulah Musgrave. Like the Montgomerys, this couple benefited from higher education (Bates College and the Central Maine Medical School of Nursing, respectively) and believed that everyone should have the opportunity to attend college.