



Maine Ties

News from the Maine Community Foundation

SPRING 2003

Fulfilling the promise of giving

Helping Good Organizations Do More Good

Thanks to Women, Work, and Community's Steps to Economic Security program, Sewing Solutions, a small owner-run business, is on firmer footing.

From Portland to Presque Isle, from Bingham to Belfast, **Maine Centers for Women, Work, and Community** offer training classes for women to increase their economic security. Workshops are designed to help participants take a new look at their business and its needs, and to plan for future financial security.

The training helped Elissa Conger, owner of Sewing Solutions in Portland, to see "the whole economic picture." She looked at not just where the money was coming from, but where it was going in order to figure how to increase her profits.

In these difficult financial times, economic security for women, especially for those who are single providers

for families, couldn't be more important. "Women, Work, and Community seeks to improve the lives of women and their families by helping them get jobs that pay a livable wage, provide them access to education and training, and help them start small 'micro's' that can contribute in a significant way to their household income," says Eloise Vitelli, Director of Program and Policy Development at WWC.

The Maine Community Foundation, in partnership with **Common Good Ventures**, is investing in Women, Work, and Community to help the organization fulfill its mission. MCF and CGV have been assisting in three areas: funding strategies, with emphasis on board engagement; assessing and addressing financial reporting and management information systems; and identifying opportunities to deploy staff more effectively.

Women, Work, and Community is



Elissa Conger showcases her business, Sewing Solutions, at the Women, Work, and Community's Legislators and Funders Reception at the Senator Inn in Augusta in February. PHOTO: PAULE FRENCH

one of five Maine organizations benefiting from the capacity building program. The Maine Community Foundation offers grants of up to \$20,000 for three years to non-profit organizations. Equally important, program participants receive one-on-one management assistance and strategic coaching from Common Good Ventures.

"Tailored, high-engagement philanthropy, accompanied by significant, multi-year dollars, could not be more timely as nonprofits in Maine struggle to do more with the same or fewer dollars," says Ann Tartre, Director of Donor and Program Services at MCF. "This program was created to help good non-profits get better at what they do. We are hopeful that more donors and foundations will see the lasting benefits of capacity building and include this strategy in their grant-making portfolios."

According to a recent evaluation conducted by the **Foundation Strategy Group at Harvard University**, the Maine Community Foundation's capacity-building program offers an "innovative, unique and flexible opportunity to achieve organizational development goals, and directs resources to critical needs that are often overlooked by both grantees and funders."

2003 Capacity Building Partners

Maine Center for Economic Policy

MECEP is an independent, state-wide, non-partisan research organization whose mission is to advance public policy solutions to achieve a prosperous, fair and sustainable economy. MCF/CGV will be supporting the center to increase awareness and use of its services and publications through targeted marketing. In addition, they will be working to diversify the center's funding sources and to help staff and board streamline processes.

Eastern Area Agency on Aging

EAAA's mission is to maintain the independence, promote the well-being and improve the quality of life of older Maine citizens in Penobscot, Piscataquis, Hancock and Washington counties. MCF/CGV will be working with the agency to assess the feasibility of, and possibly implement, an income-generating enterprise that will support its mission and help to diversify its funding sources.

Preventing Hate Violence: The Unity Project

Across Maine, as communities grow more diverse, schools are increasingly struggling with problems of prejudice and harassment. In Lewiston, over the past year, many Somali families have settled in the city causing a significant change in the composition of the student body at the high school. While many Lewiston High students were welcoming, a vocal and active minority expressed hostility, suspicion and racial bias when Somali students started to arrive in 2001. The climate was tense.

Enter the **Center for the Prevention of Hate Violence** and its **Unity Project** directed by the Center's founder, Stephen Wessler. Funded in part by two component funds at the Maine Community Foundation, the Unity Project is a student leadership development program that seeks to provide participants with an understanding of the destructive power of verbal harassment.



Focus on Diversity

The New Suncook Elementary School in Lovell hosted master percussionist Michael Wingfield, Afro-Caribbean musician, as part of their curriculum focus on diversity. Wingfield's residency was part of the Partners-in-Arts-and-Learning (PAL) project for SAD 72 schools. The project received funding from a wide range of community and state foundations, including the Maine Community Foundation.

PHOTO COURTESY DENMARK ARTS CENTER.

The Unity Project is a school-wide effort to build greater awareness among students, faculty and staff of the issue of verbal harassment. The project also provides them with tangible skills for how to intervene in low-key ways when they witness students using degrading language or racial slurs.

The Maine Community Foundation has been an important partner for the Center since it was founded in 1999. "No other funder has provided the continuity of support for the work of the Center more than MCF," director Wessler said. "Seed funding has helped launch new projects and demonstrated viability, which is key to attracting other funders."

The relationship between the Maine Community Foundation and Stephen Wessler goes back a full decade. In 1993, then Deputy Attorney General Wessler was in the midst of establishing the **Civil Rights unit of the Maine Attorney General's Office**. Early on in his work he recognized that the perpetrators of hate crimes were often young people. Given this



Lewiston High School students work together to keep their school safe and respectful.

PHOTOS COURTESY CENTER FOR PREVENTION OF HATE VIOLENCE



fact, he felt that early intervention and prevention programming in the schools was essential to creating safer Maine communities.

Sharing this vision for building more inclusive Maine communities, the Maine Community Foundation provided funding through a grant to the **Holocaust Human Rights Center of Maine**. Wessler and his colleague, Elizabeth Sweet, implemented nine training workshops for school superintendents and principals as the first step to creating a consensus among local school leadership that this issue was one to which faculty time and school resources should be devoted.

In 1994-95, the MCF board of directors and staff were similarly focused on how to create more tolerant Maine communities, especially in light of increased bias and violence directed at the gay and lesbian community. At the invitation of then foundation President Marion Kane, Wessler made a presentation to MCF's board of directors as a way to inform its work on identifying issues of strategic importance and establishing grant-making priorities.

In the mid to late 1990s, one of the initial hate violence prevention strategies developed by Wessler and the Maine Attorney General's Civil Rights division was the establishment of student-led civil rights teams in schools. In 1998, MCF supported this program with a \$5,000 grant to be used for mini-grants to support school-based civil rights team projects initiated by students.

Continued on next page

Expansion: New Hancock County Fund Makes First Grants

Earlier this year, the Maine Community Foundation launched the Hancock County Fund, the ninth county fund established by MCF.

An advisory committee of county residents, chaired by Ann Waldron of Southwest Harbor, review proposals. Grants are made from a permanent fund, restricted to supporting non-profit and public organizations serving Hancock County.

"Thanks to the generosity of several donors devoted to Hancock County, we can now add significantly to our grant making in this area," said Henry Schmelzer, president of the Maine Community Foundation. "As the foundation celebrates its 20th anniversary it is fitting that we should be launching a county fund in our own backyard," he said.



Students in the third grade at the Mountainville School in Sullivan are ready to start planting. Thanks to a grant from the Hancock County Fund, the landscape around their classroom will be transformed into a garden laboratory. They are joined here by Principal William Dove and teachers Sharon Barnes and Mary Seward. PHOTO: CARL LITTLE

Teaming Up for Leadership in Western Maine



June Meres and Kay Laney (at left) discuss their work re-energizing the Norridgewock Chamber of Commerce while Mary Jane Reed, Betty Cobb and Nan Berry brainstorm ideas for engaging the North New Portland community in plans to renovate its historic church building. PHOTO: TANYA SWAIN

Lead Western Maine completed its pilot program this winter. Teams from Norridgewock, Rumford, North New Portland and Farmington/Bingham worked on community projects ranging from the creation of a community diabetes education program to an employment training initiative aimed at providing medical billing software training and employment opportunities for low-income families.

Supported by the Maine Community Foundation, with assistance from the **Western Mountains Alliance** in Farmington and **Pathway Partners** in Salem Township, the program has coordinated six monthly training sessions around leadership and community development.

The Unity Project

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Relationships formed with the Foundation and individual board members would prove important when Wessler launched the **Center for the Prevention of Hate Violence** at the University of Southern Maine in 1999. Several current and former board members stepped forward to provide significant gifts toward the Center's first year of operation, and MCF, through an anonymous donor, provided a \$25,000

grant for curriculum development.

In 2000, MCF provided grant support through its county program for the Center's **Student Leaders Project**, a leadership development initiative targeted at small and rural schools. The project sought to engage a broad base of leaders from a wide variety of formal and informal student groups, including those that might involve potential perpetrators of hate violence.

In 2001, a grant from an MCF donor supported the Center's **Responding to September 11th Project**. This project

consisted of a compilation of interviews with members of Maine's Muslim community on what has transpired since September 11th with respect to incidents of bias and prejudice, how these incidents have affected their daily lives, and what help or assistance Muslims would like to receive.

The relationship between MCF and Wessler has gone beyond grantmaking. "Technical assistance and encouragement from Marion Kane and Meredith Jones have been extremely valuable to me over the years," Wessler says.

Opportune Times for Charitable Lead Trusts

Clients may still be feeling the pain of the downturn in the stock market. When one considers the maxim that history repeats itself, however, an opportunity presents itself for clients and philanthropy alike. A charitable lead trust is a strong estate planning option when clients are optimistic about the future appreciation of certain assets and wish to pass those assets along to heirs. This option can also reduce estate and gift tax expenses and lead to a philanthropic legacy for communities and state.

The IRS's assumed investment rate of return is as low as it has been in many years. Combine that with low stock values and you have the makings of the optimal circumstances for a charitable lead trust.

For many, the charitable lead trust, involving a gift that produces income for a charity but ultimately passes at potentially appreciated value to heirs, could be the best current way to support charity while preserving assets for the next generation. While there is potentially a gift tax due when the trust is created, the tax is reduced to reflect the value of what the charity is projected to receive in payments during the term of the trust.

Clients may want to consider using undervalued assets to fund a charitable lead trust. The appreciated value of the asset coming from the trust to the designated heir—after the income has been paid to a charity for a term of years or a lifetime—passes without tax to the extent the combined



Ellen Pope
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amount of income and appreciation exceeds the IRS's predicted growth rate. With asset values and IRS projections of growth at historic lows, a charitable lead trust could prove to be a powerful tax-saving tool.

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How John Morrill's deathbed epiphany led to one of Maine's most successful philanthropic funds

by Sean Donahue, from *Mainebiz*, October 28, 2002

[John] Morrill jokes that his deathbed epiphany [in 1992] sounds like a cliché, but how he reacted to that experience is anything but trite. In 1999, Morrill created a philanthropic venture called the Aristotle Fund, which gives away thousands of dollars each year to Maine-based nonprofit organizations.

...The Aristotle Fund is now one of the largest and most important funds administered by the Maine Community Foundation, which helps manage its grant requests and donation process. Morrill has emerged as a major force in Maine's nonprofit community, and a model for other would-be philanthropists.

...Morrill hadn't planned on becoming a philanthropist until he had arrived in Maine and began to hear about Betty Noyce's Libra Foundation. Something clicked. "I became entranced by the idea of community philanthropy," he says.

He chose individuals well connected to Maine's nonprofit community—Ed Kfoury, a member of The Nature Conservancy board; Dick Spencer, former president of the Audubon Society; and [Ann] Willauer [director of marketing and development at the Children's Museum of Maine]—relying on their experience to select the proposals that would have the most impact on children's causes and environmental conservation, his chosen areas of support.

...Tempting as it may be to make gifts himself, Morrill stays out of the grantmaking process. After transferring his annual gift to the Maine Community Foundation each spring, Morrill relies on the MCF to collect grant requests and on his advisory board to choose the recipients.

...[Morrill] is happy focusing on his family and his money management business, which he hopes will grow so the Aristotle Fund can continue to give larger grants each year. But even at this level, and without the personal



A brush with death led John Morrill to philanthropy. PHOTO: DAVID A. RODGERS

attention from the groups he has helped, the rewards of community philanthropy have far exceeded Morrill's expectations.

"Now my life really reflects my experience [in the hospital]," says Morrill. "I wanted to show my kids that life is not just about accumulating wealth, and I wanted to build my self-esteem by giving back to my community. It just gives me this great positive feeling."

A Passion for Philanthropy: Rob & Kathleen Flory

Community commitment is a **C**given for Rob and Kathleen Flory. For Rob, the responsibility stems from a heritage of giving that reaches back to his father, who was instrumental in the early years of the **Licking County Foundation** in his hometown of Newark, Ohio.

“Service and generosity were core values in my family,” says Rob. “I have a history of relationships with community foundations and witnessing financial stewardship. My mother was notoriously generous. Now that Maine has become our community, we are vitally concerned with supporting the philanthropic community here.”

Kathleen’s sense of responsibility stems from experience. Raised in Harrisburg, Pennsylvania, she watched her parents struggle with mental illness, many children and few resources. “It’s vital that one understand the challenges that these issues create and then act purposefully and positively to address them,” she states.

The couple lived in Pittsburgh until 1994, when they were able to fulfill Rob’s longtime dream of moving to Maine. He had been a counselor at **Camp Kieve** as a youth and longed to return to the beauty and simplicity of the Maine coast.

Since their move to Maine, they have immersed themselves in community work in addition to their other commitments. Kathleen has a profoundly retarded grown daughter from a previous marriage living in a group home in Pittsburgh. They also

have a grown son in Boston. Rob is President and Chief Operating Officer of **Flory Investments**, a bi-coastal private venture capital firm investing in small- and medium-size companies. His office is but a short walk from his home on the Damariscotta River.

Savvy with finances, Flory chose the Maine Community Foundation because, he says, “There are competi-

its leadership. “We were attracted to the Foundation because of the dynamic leadership of Marion Kane and the extraordinary talent that was on its board, including Betty Noyce and Allen Fernald,” says Flory. “That confidence has continued.”

Adds Kathleen, “We met with the Foundation when we first came to Maine and made a decision that that’s where we wanted to go.” They quickly established the **Flory Fund** at the Maine Community Foundation, a very focused donor-advised fund.

To ensure that the Flory Fund continues long after they are gone, Rob and Kathleen have included a legacy to the foundation in their will. “It will be used to further the realization of the objectives of the Flory Fund,” says Rob.

The Florys know that their bequest to the Maine Community Foundation will ensure that their longtime philanthropic goals are fulfilled. As Rob notes, “Planned giving offers people the opportunity to continue to have philanthropy pursued long after

they’ve stopped being participants.”

While their interests are wide-ranging, their giving focuses on the socio-economic issues of family life. With Kathleen’s background, they find they care deeply about women who are victims of domestic violence, along with disadvantaged

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To ensure that their donor-advised fund continues to fulfill their philanthropic goals, Rob and Kathleen Flory have included a legacy to the Maine Community Foundation in their will. PHOTO: DARWIN K. DAVIDSON

tive advantages that community foundations have as opposed to private foundations. Community foundations provide donors with most of the same functions and services as private foundations without the attendant costs. Further, the programmatic competence of the MCF is extraordinary.”

The couple was also impressed with



(From left) Virginia Campbell, Priscilla Washburn, Andrea Dill, Maggie Paschal and (standing) Charlene Hardy work on quilts at the Hammond Street Senior Center in Bangor. PHOTO COURTESY ALEXANDRA TURALLO, QUILTING PROJECT DIRECTOR.

The Haskell-Stetson Fund, newly established at the Maine Community Foundation, awarded more than \$56,000 in grants to 17 organizations and agencies in the Bangor Hydro-Electric Company service area.

Among the nonprofits awarded grants are the **Couri Foundation**, for a quilting project at the Hammond Street Senior Center in Bangor; the **Cranberry Isles Realty Trust**, for an affordable housing project; the **Ark Animal Shelter** in Cherryfield, to increase publicity about companion animal adoptions; **Peninsula Tomorrow**, to produce a survey and report on issues faced by citizens on the Blue Hill Peninsula; and the **Wabanaki Development Project** in Old Town, to implement a Youth Build Program.

Alfond Brothers Establish Funds to Benefit Maine

William Alfond of Boston, Massachusetts, and Peter Alfond of Belgrade Lakes, Maine, have established charitable funds at the Maine Community Foundation that will benefit Maine nonprofits.

"The Foundation is aware of the many wonderful things the Alfond family has done for the state of Maine," said Henry Schmelzer, president of the Maine Community Foundation. "We are proud to be able to help William and Peter Alfond achieve their charitable goals."

The two funds grew out of an agreement with the **Yawkey Foundation** at the time of the sale of the Boston Red Sox last year. Former owners of the Red Sox, including



the Alfond brothers' **Dexter Group**, designated charities to receive donations from the sale. The brothers decided to place the funds with the Maine Community Foundation.

"The Alfond brothers selected MCF for its philanthropic expertise and resources, and for the efficient way it handles assets," said Gregory Powell, attorney for the Dexter Group, who helped transfer the funds to MCF. The Alfonds have been generous to Maine charities over the years. **The Maine College of Art, Kent's Hill School, Maine Youth Leadership, Goodwill-Hinckley** and the **Two Ten Foundation** are among the nonprofits that have received their support.

Rob and Kathleen Flory

Continued from previous page

children, family planning issues and the global crisis that AIDS has engendered. Recent gifts have gone to the **Maine Children's Alliance, Family Planning Association** and the **Maine Community AIDS Partnership (MCAP)**, among other organizations. Frequently, their giving leads to greater personal involvement. They first got involved with MCAP as donors, but recently Rob co-chaired the organization.

Kathleen sits on the board of the Family Planning Association of Maine where she is now on the steering committee for its capital campaign. "My passion," she says, "is helping women in the state get the reproductive health care they need." She is concerned that women across the state get the necessary information and care they require and that young people are taught family life education.

"I grew up in a very large family," she says. "There were issues around just being able to get support and health care advice." For many women, such issues continue today, a fact that Kathleen can't ignore. That there is still so much neglect and abuse, so much domestic violence, so many struggling children, drives Kathleen to work in her community as an activist and a donor. She volunteers at a local preschool and, along with her husband, for their local church, St. Andrew's Episcopal Church of Newcastle.

They are both avidly involved in the arts. Kathleen studies piano and painting, while Rob is the chair of the board of the Friends of the **DaPonte String Quartet**, a well-known chamber music ensemble that came to Maine from Philadelphia on a rural arts grant and decided to stay.

Though Maine remains at the center of their hearts, Rob has not forgotten his hometown, or his responsibility to his mother and father's legacy. He hasn't lived in Licking County since he was twelve, when his father died, but Rob is still a board member of the Licking County Foundation where he helps serve the community's needs through an unrestricted fund that he and his brother created to honor their parents.

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Members of the Maine Community Foundation gathered in Eastport, Maine, for their annual retreat last September. At a community dinner, the board, staff, county advisors and friends were treated to an exhibition of paintings and photographs by Dougal Anderson, courtesy of the Ladies of the Lake; a performance by the Washington County Children's Chorus; and a presentation by the Tides Institute. Linda Godfrey, chair of Maine Community Foundation-Washington County, served as MC. PHOTO CARL LITTLE

Calling All Founders

In honor of the 20th anniversary of the founding of the Maine Community Foundation, a Founder's Day luncheon celebration will take place at the Woodlawn Museum in Ellsworth on Monday, July 21. Invitations will be going out in May. For information, contact Carl Little, Director of Communications and Marketing, at (207) 667-9735.



Edward Kaelber, founding president of the Maine Community Foundation, and his wife, Ann, paddle the Narraguagus River on a canoe trip organized by the Downeast Senior College this past fall. The college, affiliated with University College at Ellsworth, is a volunteer organization providing a curriculum of intellectually stimulating learning opportunities and special activities for persons 50 years of age and older. A grant from the Maine Community Foundation helped underwrite the trip.

PHOTO: JAY HORSCHAK

Plan for the Future: *The Compact for Higher Education*

On March 18, Governor John Baldacci joined the Maine Community Foundation and the Maine Development Foundation in announcing the creation of the Compact for Higher Education.

The Compact for Higher Education is a commitment by Maine citizens to be among the best educated in the world. The Compact is comprised of about thirty leaders from business, community, education and government.

The Compact will encourage more high school graduates and adults to continue their education.

Joseph Boulos, chairman of the The Boulos Companies in Portland and a member of the Colby College board of trustees, is chairing the group.

The two foundations created the Compact to encourage more high school graduates and adults to continue their education. The Compact will develop a long-range action plan to dramatically enhance participation and attainment at all levels of higher education over the next decade. The action plan will strategically focus on leverage points that will yield results, such as retention, employer commitment, recruitment and private resources. The Compact also plans to launch a multi-year education campaign to change the values, expectations and behaviors of Maine citizens regarding higher education.



Joseph Boulos shakes hands with Governor John Baldacci at the press conference to announce the creation of the Compact for Higher Education. Left to right: Joseph Westphal, chancellor of the University of Maine System, Henry Bourgeois, president of the Maine Development Foundation, and Henry Schmelzer, president of the Maine Community Foundation, were among those taking part in the launching at the State House in Augusta. PHOTO: CARL LITTLE

A website, www.mdf.org/compact, lists the Compact members, funders, meeting schedule and more. Individuals may use the site to track the Compact's work and to sign up to receive electronic updates. The Compact for Higher Education is privately funded through grants from the Libra Foundation, Maine Community Foundation, MELMAC Education Foundation and the Mitchell Research Institute.

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