

# INVEST IN MAINE

MAINE COMMUNITY FOUNDATION  
REPORT TO THE COMMUNITY

2015-2016

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# INVEST IN MAINE



PHOTO: TAYLOR WITHAM

The Maine Community Foundation is at an exciting place. We are proud of our 33 years of accomplishments, but we know the foundation's future success will require more vocal, visible, and catalytic leadership. We also know that any success will require a commitment to think and plan long term and work closely with partners.

Toward that end, MaineCF staff and board revisited our Plan for the Future with the goal of sharpening the foundation's focus and increasing its impact. This process has been rewarding. We have met with—and listened to—hundreds of people throughout the state to better understand the challenges and opportunities facing Maine people and their communities. We have studied systemic social and economic challenges. We have sought input from experts on pressing issues. We have reviewed innovative national and global philanthropic practices.

Our goal throughout has been to identify ways in which we can maximize our relationships, resources, and reputation to help improve the quality of life for all Maine people. We hope to complete the planning phase of our work by early fall. We will keep you apprised.

On a tour of the Mayo Mill in Dover-Foxcroft this past May, MaineCF board and staff could see firsthand the success that can be achieved when a group of committed partners, including the Maine Community Foundation, believes in a project and is willing to invest in community—and in Maine. This complex of buildings, which was shuttered in 2007, is now a thriving community center with a café, boutique hotel, 22 market-rate apartments, and business offices, including the studio of the photographer who took this picture.

This report to the community represents a slice of the community foundation's work across Maine. We thank all of our donors and nonprofit partners who have helped us grow and prosper.

G. STEVEN ROWE  
PRESIDENT AND CEO

DIGHTON SPOONER  
CHAIR, BOARD OF DIRECTORS

PETER LAMB  
VICE CHAIR, BOARD OF DIRECTORS

## ON THE COVER: WELCOME HOME

Maine is home to tens of thousands of refugees and immigrants, including Tariq Alziadi and his daughter Sama, 4, who became U.S. citizens during a ceremony this spring at Lyman Moore Middle School in Portland. More than 55 percent of immigrants in Maine become naturalized citizens.

Alziadi's story mirrors those of many new Maine residents who have fled unstable homelands for a new life in the U.S. He left Iraq in 2010 and now works as a translator. He and his wife, Anwar Albatat, live in Sanford with daughters Sama and Lara, who is 3.

Maine Community Foundation supports immigrants and refugees through a range of competitive and donor-advised grants to nonprofits. Here are just a few organizations committed to helping new citizens:

- Coastal Enterprises, Inc., of Brunswick works with immigrants to create and support new businesses.

- Portland Adult Education's New Mainers Resource Center helps employers meet the demand for skilled and culturally diverse workers.

- New Mainers Public Health Initiative educates immigrants and refugees in Lewiston/Auburn about preventive health measures.

- Community Financial Literacy in Portland makes sure immigrants and refugees are financially prepared to reach their goals.

- Somali Bantu Community Association of Lewiston/Auburn helps refugees create a new life in Maine by addressing food security, women's empowerment, youth development, and conflict resolution within families.

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For more information about grant opportunities, contact Lelia DeAndrade, senior director for grantmaking services, at 877-700-6800, ext. 2209.



ABOVE: A man who came to Maine from Jamaica listens as the national anthem is played during a naturalization ceremony at Lyman Moore Middle School. Fifty-eight new citizens were sworn in by U.S. Citizenship and Immigration Services.

Photos: Jill Brady, courtesy Portland Press Herald

# NEXT GENERATION FOUNDATION: SUPPORTING MAINE PEOPLE

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In 2014, the Maine Community Foundation received two significant grants from the Next Generation Foundation to support nonprofits and students across the state. Last year, we began to put these resources to work, building the capacity of nonprofit organizations and helping adult learners make the transition to higher education. Additional gifts from the Next Generation Foundation led to the establishment of five agency endowments and seven designated funds at MaineCF.

## ADULT COLLEGE COMPLETION FUND

The challenges facing adults returning to college are immense, and they often lack the financial, academic, and cultural support necessary to make the move—and succeed. The Maine Community Foundation manages 20 scholarship funds that offer financial support to adult learners. Some of these funds focus on a particular part of the state; others assist specific programs and schools. Many of them carry the name of a donor especially passionate about helping these students access education: Thomas and Beulah Musgrave, Bettie MacRae, James and Marilyn Rockefeller, Henry L. P. Schmelzer, Hugh and Elizabeth Montgomery.

The community foundation's commitment to making more and larger scholarships available to adult learners was bolstered by a \$2-million endowment gift to MaineCF from the Next Generation Foundation. The **Adult College Completion Fund** currently supports students at Eastern Maine and Washington County community colleges who are participating in the Summer Success Academy, which provides intensive academic prep for college-level work, advice on financial aid, and assistance with career planning. Working with the Foundation for Maine's Community Colleges, MaineCF is providing approximately \$80,000 in financial aid each year to students at the two campuses.

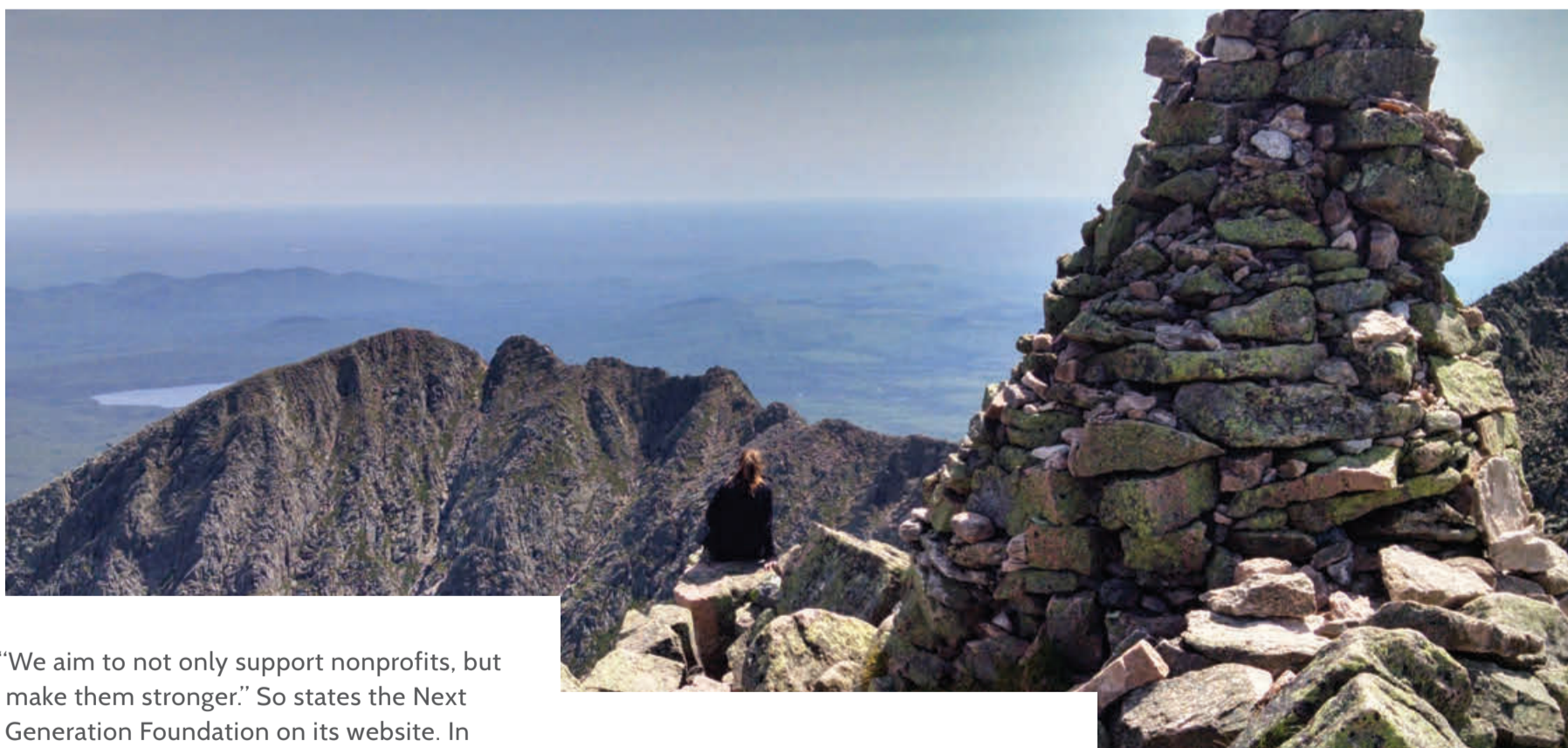
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**ABOVE:** Nursing graduate Amanda Hussey celebrates with her daughters at the 2015 Eastern Maine Community College commencement ceremony at the Cross Insurance Center in Bangor.

Photo courtesy Maine Community College System

## BUILDING STRONGER NONPROFITS FUND



“We aim to not only support nonprofits, but make them stronger.” So states the Next Generation Foundation on its website. In line with this mission, the foundation gave a \$2.5-million grant to MaineCF, which became the **Building Stronger Nonprofits Fund**. The goal of this fund is to strengthen the capacity of, and offer technical assistance to, nonprofits.

For the first year of grantmaking, MaineCF directed these funds to nonprofits applying for capacity support through four of its

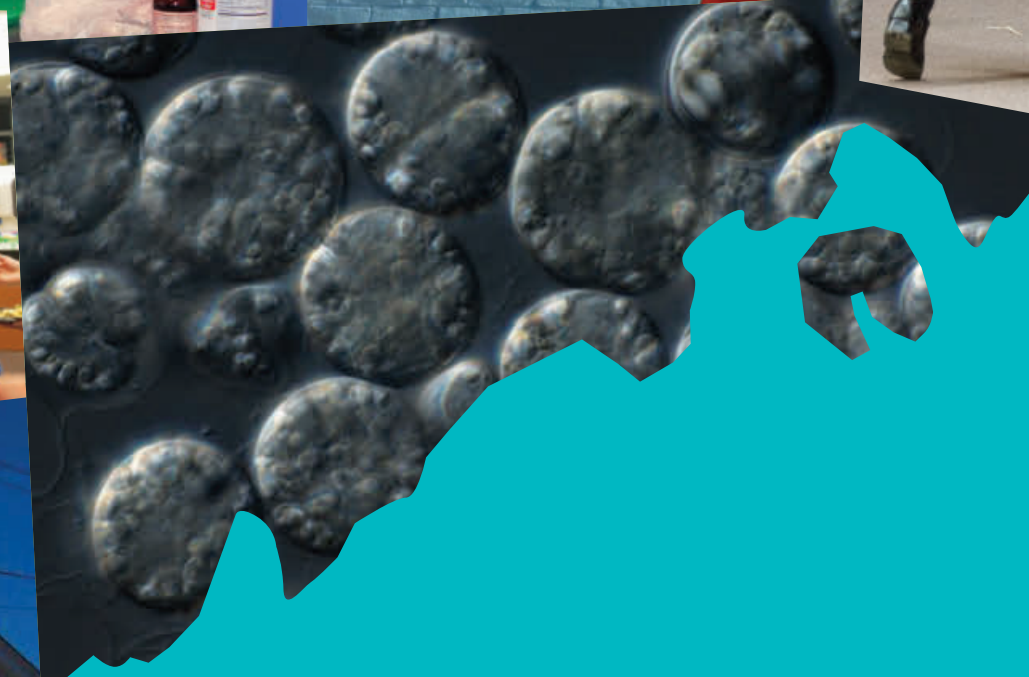
grant programs: Community Building, Equity, People of Color, and the Fund for Maine Land Conservation. A wide range of organizations have received funding, from Our Katahdin and Our Town Belfast to the Telling Room and Tree Street Youth. MaineCF plans to disburse approximately \$100,000 annually to support capacity-building efforts.

**ABOVE:** A hiker pauses to take in the view from atop Mount Katahdin, the northern terminus of the Appalachian Trail. The **Maine Appalachian Trail Land Trust** received support through the Fund for Maine Land Conservation to support planning, documentation, volunteer training, and outreach for two large conservation properties that will be acquired along the AT.

Photo courtesy Maine Appalachian Trail Land Trust

ENGAGING,  
PRESERVING,  
WELCOMING

# MAINECF IN ACTION



Maine Community Foundation helps thousands of nonprofits and individuals across Maine. In 2015, the foundation awarded more than \$25 million in grants and scholarships from its competitive and donor-advised funds. Grants support a wide range of needs and interests, including childhood education, new residents, health care, the entrepreneurial economy, historic preservation, and the arts.

## FEEDING THE COUNTY

**Aroostook County** // *Aroostook County Fund*

In Aroostook County, neighbors help neighbors get by with help from the Glean Team. A grant to Catholic Charities Maine allowed the team to collect overages from local farms and distribute more than 100,000 pounds of vegetables in 2015.

*Photo Gabe Souza*

## FOSTERING FITNESS

**Fit Girls of Wilton** // *Western Mountains Fund*

Girls in Wilton are staying healthy and learning more through this after-school running and reading program.

## TEACHING INDEPENDENCE

**Creative Work Systems** // *York County Fund*

Renovation of an industrial kitchen in Saco allows the Culinary Works program to teach clients new skills and become more independent.

*Photo Margaret Logan*

## SUPPORTING OLDER MAINERS

**SAGE Maine** // *Equity Fund*

The creation of virtual drop-in centers funded by MaineCF has made life in this large, rural state a little less lonely for older LGBT Mainers.

## ENGAGING YOUNG ARTISTS

**Farnsworth Art Museum** // *Knox County Fund*

Rockland has new art downtown, thanks to students who participated in the Oak Street Mural Arts Workshop.

## WELCOMING NEW RESIDENTS

**Mano en Mano** // *People of Color Fund*

Washington County's Latino community has found a welcoming place at Mano en Mano, which used its grant funding for a civic engagement program. On Mother's Day, youth perform for their families.

*Photo Colby Kohn*

## BRINGING DOCTORS TO MAINE

**Maine Tracks Program** // *Welch Charitable Fund*

MaineCF helps support students in the Maine Medical Center/Tufts University School of Medicine program, which provides doctors for Maine. On Match Day, students learn their residency assignments.

*Audra Wellton photo courtesy Maine Medical Center*

## ENCOURAGING INNOVATION

**Bigelow Laboratory for Ocean Sciences** // *Impact Investing*

Could algae become part of Maine's growing aquaculture industry? Researchers at Bigelow Laboratory for Ocean Sciences in Boothbay are exploring ways to incorporate algae into products at a new greenhouse funded through MaineCF.

## PRESERVING HISTORY

**Committee to Restore the Abyssinian** // *Belvedere Historic Preservation Fund*

Grant funding supports restoration of the Abyssinian Meeting House in Portland, Maine's oldest African-American church. The building is listed on the National Register of Historic Places.

# NEIGHBORS HELPING NEIGHBORS

As the Maine Community Foundation sharpens its programmatic focus, staff and board will look for ways we can provide more support to help meet some of the basic needs of Maine people. Here are a few grants and funds that offer inspiration.

## TRINITY JUBILEE CENTER

The Trinity Jubilee Center in Lewiston focuses on food security, public health, community education and support, and youth development. Patrons of the food programs can also receive assistance to write their resumes and find work, make an appointment at the center's free clinic, and utilize its day shelter. These and other comprehensive services assist more than 1,000 people each week as they navigate challenges in their lives.



## WALDO COUNTY WOODSHED

With the motto "warm thy neighbor," the Waldo County Woodshed in Belfast provides firewood for people in need through distribution sites in Searsmont, Waldo, Monroe, Frankfort, Belfast, and Brooks. The Woodshed received a grant from MaineCF's Maine Charity Foundation Fund in 2015. For the 2016 grant cycle, the fund will focus on programs for children and older adults, especially those that support people who are vulnerable or disadvantaged because they live in poverty and/or lack access to education, housing, food, and transportation. Visit [www.mainecef.org](http://www.mainecef.org) for new guidelines.

## NEIGHBOR4NEIGHBOR FUND

In 2014 Ed Kaelber, MaineCF's founding president, established the Neighbor4Neighbor Fund at the community foundation to provide mini-grants to elderly citizens in Hancock County that help cover the cost of various necessities, including winter clothing, wheelchairs, and hearing aids. "My inspiration for this fund comes from my desire to give back to our community," says Kaelber, "and to encourage others to support seniors in the community who have unmet needs."

**TOP:** Lunch is served at the Trinity Jubilee Center.

Photo Erin Reed, Trinity Jubilee Center

**MIDDLE:** A group of students in the forestry program at the University of Maine processed two cords of hardwood from the University Forest for the Waldo County Woodshed to help heat homes next winter.

Photo Charlie Cox

**BOTTOM:** The Neighbor4Neighbor Fund is administered by Healthy Acadia, which offers a range of programs to Hancock and Washington county residents of all ages. Here, residents of Brooklin take part in a Tai Chi class.

Photo courtesy Healthy Acadia



# MAINE COMMUNITY FOUNDATION BOARD OF DIRECTORS

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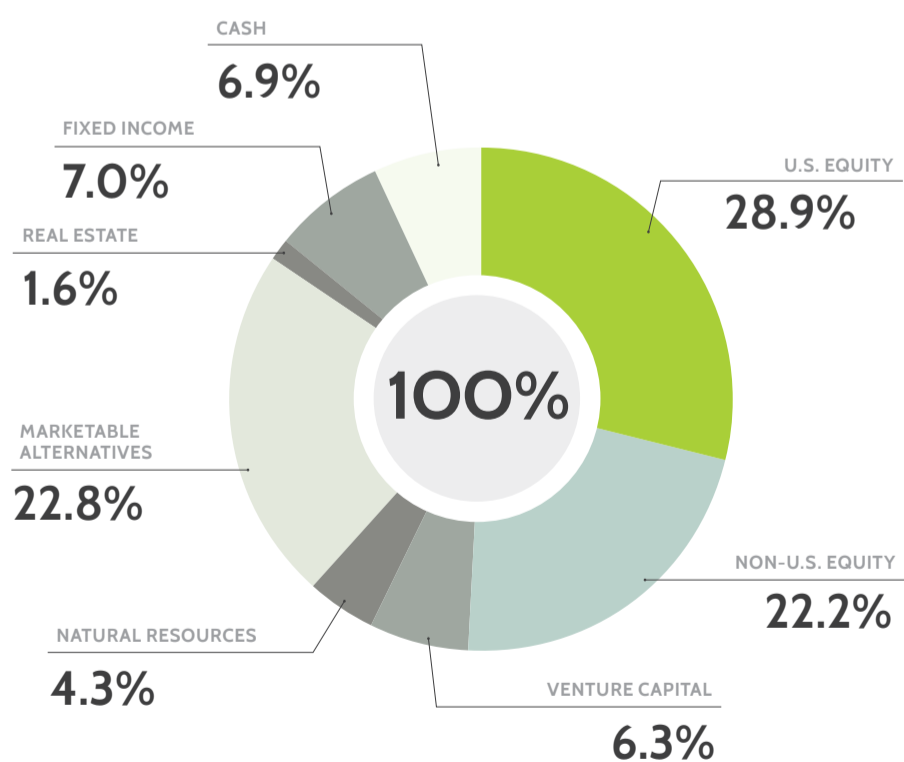
# 2015 FINANCIAL SUMMARY

The Maine Community Foundation's finances held steady in 2015 despite significant fluctuations in the markets. The community foundation surpassed the \$420 million mark in assets and awarded a record amount in grants and scholarships. The following chart provides financial figures as of December 31, 2015, with comparative information for the preceding year.

	2015 (unaudited)	2014
<b>Assets</b>		
Donor-advised funds	173,831,420	159,618,248
Endowment funds held for nonprofit organizations	67,748,914	63,899,146
Funds designated to specific organizations	66,021,094	64,005,880
Field-of-interest funds	62,017,280	63,861,798
Scholarship funds	36,354,318	36,883,239
Charitable gift annuities and other planned gifts	6,460,260	8,819,567
Special programs	2,088,053	1,843,372
Supporting organizations	8,323,241	8,831,799
Operations	3,991,908	4,347,076
<b>Total Assets</b>	<b>426,836,488</b>	<b>412,110,125</b>
<b>Gifts Received and Additions to Endowment Funds</b>		
Donor-advised funds	34,349,885	14,764,297
Endowment funds held for nonprofit organizations	8,367,257	7,644,103
Funds designated to specific organizations	1,740,067	3,516,695
Field-of-interest funds	1,757,496	3,455,130
Scholarship funds	2,342,069	8,150,875
Charitable gift annuities and other planned gifts	0	2,296,741
Special programs	843,751	580,445
Operations	948	1,583
<b>Total Gifts and Additions to Endowments</b>	<b>49,401,473</b>	<b>40,409,869</b>
<b>Grants Paid and Distributions from Endowment Funds</b>		
Donor-advised funds	23,887,706	14,595,257
Endowment funds held for nonprofit organizations	3,414,952	2,705,890
Funds designated to specific organizations	2,771,916	2,360,635
Field-of-interest funds	3,061,218	2,411,721
Scholarship funds	2,158,996	2,065,129
Supporting organizations	248,613	222,499
<b>Total Grants and Distributions from Endowments</b>	<b>35,543,401*</b>	<b>24,361,131</b>

The annual audit of the 2015 statements was not complete at the time this report was printed. If you would like an audited financial statement, please contact Vice President and Chief Financial Officer James Geary by email at [jgeary@mainecf.org](mailto:jgeary@mainecf.org), or by phone, at 877-700-6800. You can also visit [www.mainecf.org](http://www.mainecf.org) to view audited financial statements, tax returns, and to learn more about the community foundation's investment program.

\*This figure includes an unconditional grant commitment of \$10 million.



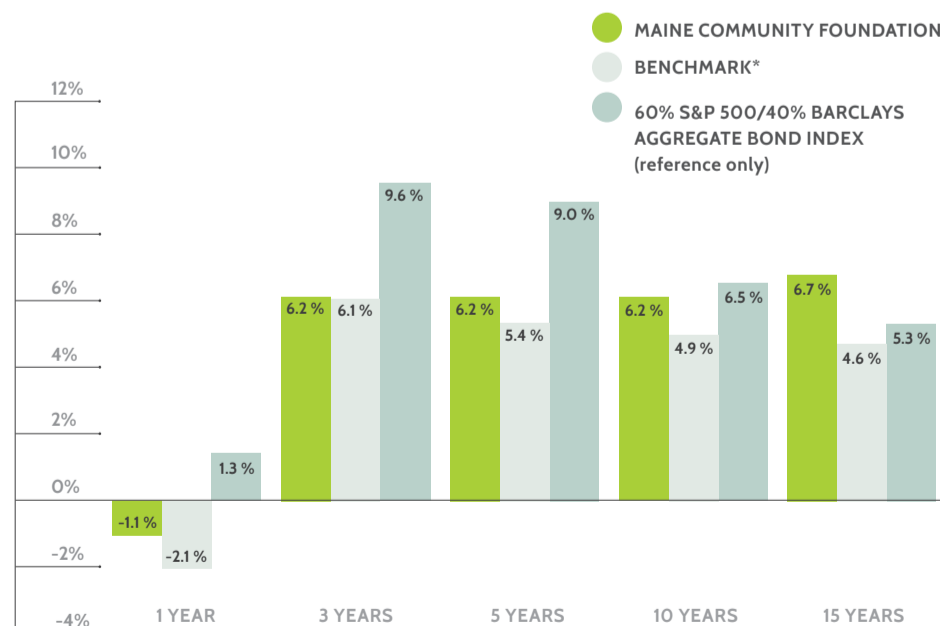
## A DIVERSIFIED PORTFOLIO

The goal of the Maine Community Foundation investment program is to preserve and enhance the real value of assets over time. To help accomplish this goal, the community foundation maintains diversified asset allocations and utilizes more than 30 different investment managers who employ a broad array of strategies and span the globe.

Additional financial and investment information is available at [www.mainecf.org](http://www.mainecf.org)

## INVESTMENT PERFORMANCE

Effective stewardship of philanthropic assets is the key to building permanent charitable funds to strengthen Maine communities. While the past decade has been especially challenging for investors, the Maine Community Foundation has maintained a secure record of risk-adjusted returns, annualized in the top quartile of more than 450 endowments and foundations as reported by Cambridge Associates.



\*From 01/01/04 to 09/30/05, the benchmark was 55% Wilshire 5000 Total Market Index; 30% Barclays Capital Aggregate Bond Index; and 15% MSCI All Country World ex U.S. Index (net). From 10/1/2005 to 6/30/2012, the benchmark was 35% Wilshire 5000 Total Market Index; 15% MSCI World ex U.S. Index; 5% MSCI Emerging Markets Index (net); 5% Wilshire U.S. REIT Index; 5% Natural Resources Blend (50% Goldman Sachs Commodity Index, 50% MSCI World Natural Resources Index); 20% HRFI (Hedge Fund Research Inc.) Fund of Fund Composite Index; and 15% Barclays Capital Government Bond Index. Starting 7/01/2012, the benchmark is 35% S&P Total Market Index; 20% MSCI All Country World ex U.S. Index (net); 5% Wilshire U.S. REIT Index; 5% Natural Resources Blend (50% Goldman Sachs Commodity Index, 50% MSCI World Natural Resources Index); 20% HRFI (Hedge Fund Research Inc.) Fund of Funds Composite Index; and 15% Barclays Capital Government Bond Index.

# WAYS TO INVEST IN MAINE

## NEW FUNDS

Special thanks to the donors and nonprofit partners who established funds at the Maine Community Foundation last year. We hope this small sampling conveys a sense of their commitment to people and places in Maine.

**ANDROSCOGGIN GREENWAY COMMUNITY FOREST FUND**  
To support the Androscoggin Land Trust and the conservation stewardship of the Androscoggin Greenway Community Forest

**BELFAST FREE LIBRARY FUND**  
To support the charitable or educational purposes of the library

**HOSPICE VOLUNTEERS OF SOMERSET COUNTY FUND**  
To support Hospice Volunteers of Somerset County

**INVEST IN MAINE FUND HONORING MEREDITH JONES**  
To address issues in Maine as they emerge over time, supporting programs and projects that enhance Maine communities and quality of life

**SUSAN MORRIS AND CHIP NEWELL FUND**  
To benefit nonprofits in Maine and elsewhere

**MOUNT DESERT ISLAND EDUCATIONAL ENHANCEMENT FUND**  
To expand educational opportunities for young people attending schools in the Mount Desert Island Regional School District

**STRATER DOWNEAST SCHOLARSHIP FUND**  
To provide support to Washington County students pursuing post-secondary education

To find out how you can start a fund at the foundation, visit the "Donors & Fundholders" section at [www.mainecef.org](http://www.mainecef.org).

## LEAVE A LEGACY

### THE SALLY S. TONGREN SCHOLARSHIPS

Sally Stetson Tongren (1926-2014), a Houlton native, bequeathed nearly \$4.8 million to the Maine Community Foundation to endow two scholarship funds for students in Aroostook and Washington counties. The funds, which will begin making awards in 2017, will benefit students when they graduate from high school.

Tongren was the daughter of Albert K. and Hazel Hewes Stetson. Her father was the owner and publisher of the *Aroostook Pioneer*, the first weekly newspaper in The County. She attended Houlton schools, graduated from Oak Grove Academy in Vassalboro, and earned a bachelor's degree from Wellesley College. She had a keen interest in animals; she was a docent at the National Zoo and published several books about animals. She and her husband, Hale N. Tongren, lived most of their adult lives in Virginia, where he taught at George Mason University for 31 years. They moved to Topsham in 2005.

"We are honored to be able to help fulfill Sally Tongren's legacy," said MaineCF CEO and President Steve Rowe. "These scholarships will provide a financial boost to Aroostook and Washington county students as they head for college."

When you give through the Maine Community Foundation, you are joining thousands of charitably minded individuals who are committed to strengthening Maine. Our in-depth knowledge of the state and our expertise in philanthropy will help you transform your passion for giving into powerful, meaningful change. Here are a few giving options:

### + GIVE NOW +

#### NAME YOUR PASSION: CREATE A FUND

Thinking about starting a family or corporate foundation? A donor-advised fund, named or anonymous, may be a tax-advantaged and convenient alternative. A scholarship, a fund to support a favorite organization or a particular cause—there are many ways to partner with the community foundation to fulfill your passions through philanthropy.

#### LEAD WITH US: DONATE TO A FUND

Help us strengthen local communities by giving to the community foundation's county and regional funds or partner with us by supporting statewide flexible funds such as the Critical Issues and Invest in Maine funds.

### + GIVE LATER +

#### GIVE TO THE FUTURE: MAKE A PLANNED GIFT

Your legacy can be shaped to support the causes you care about now while providing financial and estate savings.

### + TO LEARN MORE +

Visit [www.mainecef.org](http://www.mainecef.org) or call Laura Young, vice president for philanthropy, at 877-700-6800, ext. 2206, or email her at [lyoung@mainecf.org](mailto:lyoung@mainecf.org) for a confidential consultation.



ABOVE LEFT: Unknown artist, portrait of Sally Tongren

ABOVE RIGHT: Covers of two of Sally Tongren's books on animals  
Courtesy Caroline Winslow, Program Supervisor, Friends of the National Zoo