

Maine *Ties*

NEWS FROM THE MAINE COMMUNITY FOUNDATION



A STRONG START

One of the Maine Community Foundation's strategic goals is to ensure all Maine children receive a healthy start and arrive at kindergarten developmentally prepared to succeed in school and life.

I recently visited an Early Head Start class in Sanford where I found myself surrounded by happy, energetic young children in full childhood learning mode. I was reminded that children's early experiences help build brain architecture and set the developmental trajectory for lifelong learning, behavior, and health. I was also reminded that investing in young children and their families is the most cost-effective way to address critical issues such as health outcomes, graduation rates, workforce readiness, and overall quality of life.

This *Maine Ties*, along with our summit on November 14 (see back cover), are part of the Maine Community Foundation's commitment to increase public understanding about the critical importance of children's early experiences, and to advocate for policies and mobilize resources to support young children and their families.

In addition to the focus on early childhood, this newsletter features stories about multi-generational donors, new and engaged board members, a Western Mountains Fund advisor committed to community outreach, and a trusts and estates attorney who helps his clients fulfill their charitable goals. Each of these individuals plays a key role in helping the Maine Community Foundation improve the quality of life for all Maine people.



Steve Rowe is president and CEO of the Maine Community Foundation.



Above: MaineCF President and CEO Steve Rowe reads a book to children at the York County Community Action Corporation's Early Head Start classroom in Sanford. Reading and other "serve and return" interactions are crucial to the brain development of young children.

On the cover: Early Head Start teacher Kendra Evans looks on as 22-month-old Princemi learns how to handle a watering can at the Opportunity Alliance in Portland.



PREPARING FOR THE BIG DAY

Family child care providers in Skowhegan dedicate their days to preparing children for school – and life.

Tomorrow is the first day of school for 5-year-old Caleb, and he's bouncing with excitement. Both he and his 10-year-old brother have spent their days with family child care provider Delores Alberico in Skowhegan since they were just six weeks old.

"He is going to do an amazing job in kindergarten," says Alberico, as Caleb shows a visitor how a kiss from "Dee" on his hand will comfort him if he gets lonely at school. She's worked hard for years at her home-based business to ensure all the children in her care will be developmentally ready when their big day arrives: "I'm confident they're all going to succeed."

About 1,000 family providers in Maine have enough slots to care for an estimated 11,000 children younger than five, according to the Maine Children's Alliance. Home-based care is an important option for parents who seek

licensed child care facilities in rural areas where large centers are scarce.

The profession can be isolating with long hours and low pay, but providers in Skowhegan – along with parents and their young children – are fortunate: Business executives from the Maine Early Learning Investment Group (MELIG) have invested resources and partnered with nonprofit Educare Central Maine, a demonstration program for high-quality early care and education in Waterville, and Kennebec Valley Community Action Program, the region's Head Start provider.

MaineCF's Western Mountains Fund, federal funding, and grants from MELIG's donor-advised fund at MaineCF help provide training and financial incentives for caregivers to nurture children from low-income families during critical development years between infancy and kindergarten.



Left: Provider assistant Sam Mellow encourages 14-month-old Dominic to climb up a slide during time outside at Chrissie Davis' HomeStart family child care in Skowhegan.

Above: HomeStart provider Delores Alberico, Harper, and Serenity practice identifying their "hands," "head," and "mouth."

“For me it is very simple,” says Chris Emmons, CEO of Gorham Savings Bank and MELIG co-chair. “We know that early development and education, starting at birth, will matter greatly in setting the path for our children’s success. We want every business leader to tout its importance as a powerful and worthy investment in Maine’s future workforce as well as a sure bet for the future of Maine’s economy.”

In Skowhegan, Educare-trained coaches visit family child care providers in the HomeStart Partnership program each week and meet quarterly with parents to ensure their children have health and wellness checks and dental, hearing, vision, developmental screenings, and information about community resources.

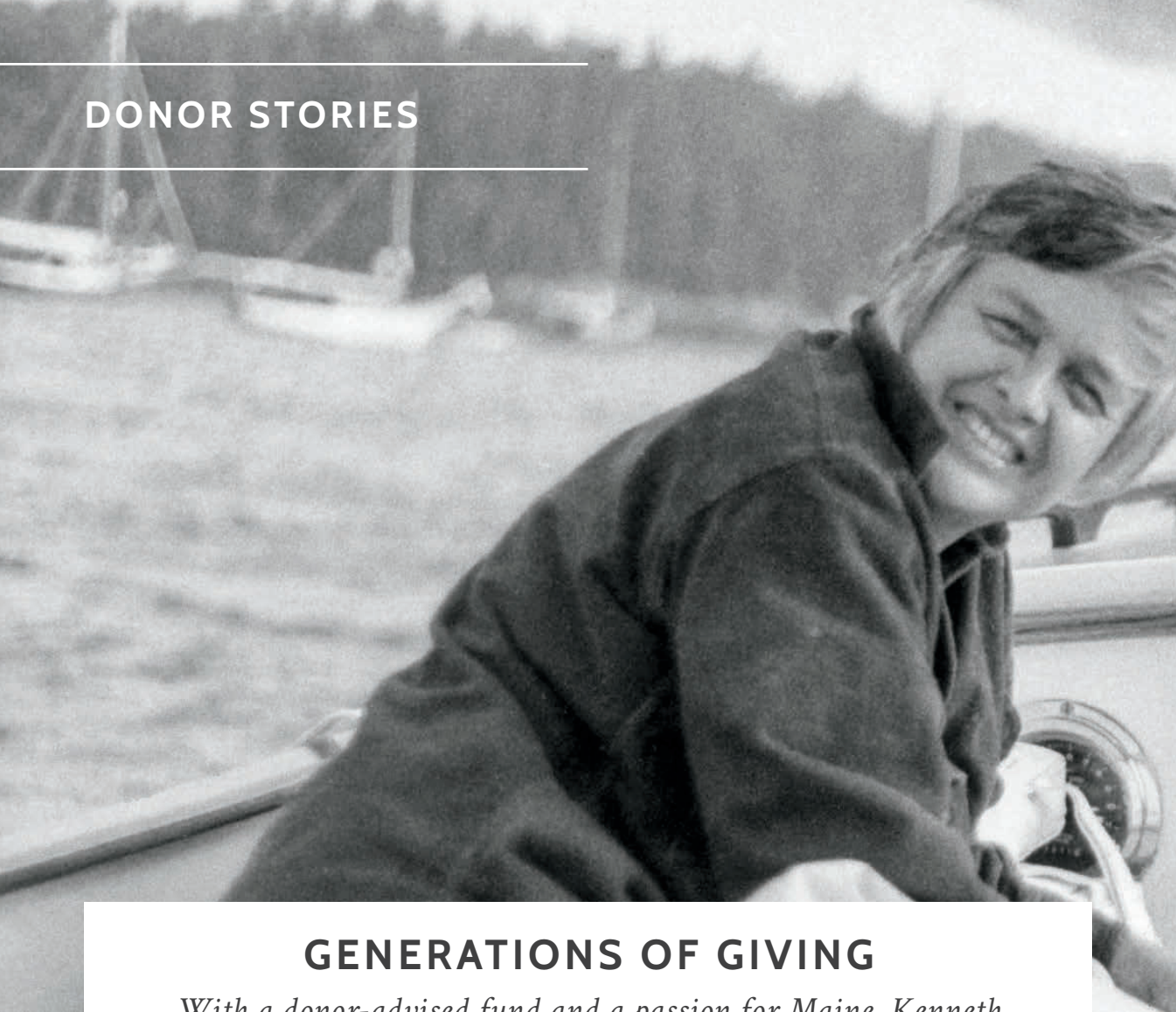
The program also requires monthly training and discussions for providers who eagerly tote home much-needed books and other supplies to bolster their research-based curriculums. Parents enrolled in the Early Head Start service pay on a sliding fee scale – a critical factor in this area with poverty, unemployment, and high child risk factors of neglect and abuse.

“You don’t just trust anyone with your precious gems – your kids,” says Alberico. “So I opened up day care and my niece and nephews were first. And I decided this was my calling – this is what I wanted to do.”

Chrissie Davis began providing child care when her son, now grown, was too young to stay home by himself and too old for day care.

“I thought, ‘Wow, I’ll watch kids. That’s got to be easy.’ Little did I know all that was involved. If babysitting was all it was, I wouldn’t still be doing it.” Parents drive from several neighboring towns to her rural Skowhegan home with its pen of goats, chickens, and other farm animals that engage children as much as the sandbox and swings.

“I learn constantly,” says Davis. “I wouldn’t want to do anything else.” And she treasures the long-term relationships she’s developed in 17 years: “That’s the beauty of this. I get all the stages. It’s a day care family.”



GENERATIONS OF GIVING

With a donor-advised fund and a passion for Maine, Kenneth and Roberta Axelson gave their sons a special gift.

When Kenneth Axelson died in May 2016 at age 93, family and friends gathered for a celebration of his life at the Farnsworth Art Museum's Wyeth Center. The setting was fitting: he and his wife Roberta (1922-2011) were longtime supporters of this centerpiece of the Rockland art scene.

The Axelsons' commitment to community stretched back to their days in New York City. Roberta was deeply involved with the Lincoln Square Neighborhood Center, and helped establish a library and after-school programming for the housing complex in a then-depressed area. Ken, who was president and CFO of J.C. Penney and the city's first deputy mayor for finance, shared his financial acumen with organizations from the New York Public Library to the Securities and Exchange Commission.

The family – Ken, Roberta, and their four sons, Kenneth, Jr., Jerrold, Stephen, and John Christian – first came to Maine in the 1960s when a couple of the boys attended summer camp. With retirement, the couple settled on a saltwater farm on Muscongus Bay in Waldoboro. They loved to sail and would take long cruises that often ended on Mount Desert Island.

In the 1980s the Axelsons moved to Samoset Point in Rockland and soon became champions of the city's burgeoning cultural scene. They were active with the Rockland Public Library Endowment Association and Ken served on the Farnsworth board. They also supported The Nature Conservancy, Bay Chamber Concerts, Camden Public Library, and Pen Bay Medical Center, among other area organizations.



Along the way, the Axelsons “fundamentally required” that their sons visit the Farnsworth, Rockland Library, and other favorite places whenever they came home, recalls son Steve. The boys joined in their parents’ enthusiasm for the changes taking place in Rockland. “We all fell in love with Maine,” Steve says.

In 1997, the Axelsons established a donor-advised fund at the Maine Community Foundation with their sons as successor advisors. Only after their parents’ passing did the four fully realize the extent of their philanthropy – and the benefits of the donor-advised fund. “The fund provides a disciplined structure for us to help fulfill our parents’ philanthropic passions,” Steve notes.

Son Chris says that the fund helped teach him and his brothers the value of giving. His parents expected that he and his brothers would inherit the responsibility and opportunity to guide their portion of the fund. “In many ways,” Chris explains, “our donor-advised fund became a part of our lives, something we knew about, paid attention to, and learned from.”

Built on generosity and a passion for community, the Axelsons’ legacy of giving lives on across the generations.

Above: Roberta and Ken Axelson aboard their Friendship sloop Puffin on a sail in Muscongus Bay around 1975. Photo courtesy Kirsten Cronin and the Axelson family



The Holt family gathers for a family photo. Clockwise from top left: Tori, Tina, Patty, and Becky with her son Gabriel.

THE HOLT FAMILY: KEEPING THE CONNECTIONS

*A mother and her three daughters get together in Maine
to talk about giving and celebrate life.*

On a morning in early August, seated on the porch of her home in Hancock overlooking the tidal Skillings River, Patty Holt holds court. Surrounded by her three daughters, Victoria, Rebecca, and Christina, the conversation is lively and marked by eruptions of laughter. “We’re kind of a noisy group,” Patty observes. Despite the hubbub, her three-month-old grandson Gabriel sleeps soundly in mother Becky’s arms.

Patricia Holt and her husband, Nicholas (1927-2006), moved from New York City to Ellsworth in the early 1960s and raised their three daughters. Nick was born in Cape Elizabeth and came to Ellsworth in 1958 to design the Knowlton Elementary School. The couple decided to settle and raise their family there.

The Holts were active in the community. Patty volunteered at Maine Coast Memorial Hospital and Ellsworth High School, which her daughters attended. Nick helped co-found Action Opportunities, now a part of Downeast Community Partners. The agency’s services range from programs for new mothers to those that help the elderly.

The Holts were especially passionate about the American Field Service (AFS), the international youth exchange program. They established a chapter at the high school, “helping to bring the world into Ellsworth,” says Patty. The daughters also benefited, meeting young people from around the globe, including a girl from Sweden and another from Chile, who lived with the family for a year. While in high school, Tina was a Youth for Understanding exchange student in Munich, Germany, and Becky spent an AFS exchange year in Mexico. Tori also went abroad, which had a profound influence on her career working for world peace.

In 1998, Patty set up a fund at the Maine Community Foundation; “I had a lot and I

wanted to give more away,” she recalls. She also wished to be anonymous at the time. Patty had admired Ken Mike’s art classes at the high school and wanted to help students pursue an art education. Her interests ran from the Down East Family YMCA and the Emmaus Homeless Center to Frenchman Bay Conservancy, The Grand auditorium, and Ellsworth Public Library.

In 2010, Patty established the Nicholas Holt Challenge Scholarship Fund at Unity College through a collaboration with the Maine Community Foundation. Nick had designed the library there and helped the college gain accreditation for its environmental teaching program. The scholarship fund supports juniors and seniors in “challenging, experiential learning projects.”

Over time the community foundation helped Patty identify new programs to support – and the daughters became active advisors of the Holt Family Fund. They have appreciated learning about organizations and projects across the state, be it the Maine Discovery Museum in Bangor or efforts to help immigrants in Lewiston. The scope of their giving has expanded exponentially.

Now living in different states – Maine, New York, and Washington, D.C. – Tina, Becky, and Tori are grateful for their downeast roots and the opportunity to stay connected to what’s happening locally, regionally, and statewide. And Patty, who now lives in Portland in the winter, looks forward to the summer visits on her porch with her girls.

In the course of the porch confab the daughters from time to time filled in a fact or two. “That’s why you have children – to keep your memories,” Patty said. And, she might have added, to carry on a legacy of giving.

VOLUNTEER PROFILE

CREATING A SWEET FUTURE FOR SKOWHEGAN

Meet Matt DuBois, one of 150 committee members who lead MaineCF's community outreach



By 4:30 in the morning, as much of the town sleeps, Matt DuBois and his crew are already hard at work, mixing dough and creating pastries to satisfy Skowhegan's sweet tooth.

In just nine years, a stop by The Bankery has become a morning ritual for customers drawn to the downtown business and its glass cases of baked goods, ornate bank vaults, and antique photos that showcase the building's 153-year history.

DuBois sees exciting times ahead for the Somerset County town once best known

for its many mills and factories. At 29, he is helping a new generation examine how the community can thrive; he has volunteered since 2013 as a member of MaineCF's Western Mountains Committee and is president of the Main Street Skowhegan Board of Directors and board member of the Maine Grain Alliance.

DuBois and his husband, Skowhegan area native Michael Hunt, and twin brother Mike DuBois, opened their bakery – and later floral

Mike Dubois, left, bakes with Matt DuBois, his twin brother. Matt says members of his generation sometimes find themselves in an awkward transition as they determine where they fit in and how to make an impact. But eventually, he says, it's time to take the reins: "We're the next generation to lead."

UPDATE

and formal wear store – armed with professional training and a passion for baking. They also learned from a Thomas College study that a bakery was residents’ top request for a new business in town.

“We didn’t want to start the business in a stripped-down place,” DuBois says. “We wanted to find something with a lot of character and charm, and when we saw this place we fell in love with it immediately.” Across Water Street, the historic downtown continues to reemerge as a vacant 1805 storefront is restored for a Cornville Regional Charter School expansion.

“Skowhegan has a lot of opportunities that we need to call on,” says DuBois. The community is assessing what it already has, “not trying to be like someone else, but what makes us special, and embellishing on that.”

Topping that list is the Run of River project, a proposed whitewater recreation area in and around the Kennebec River Gorge that DuBois and others predict will put Skowhegan on the map as a tourist destination. Five years from now, he hopes the project will be completed with walking trails and a riverside promenade – an “economic driver for our future in Skowhegan.” A grant from the Western Mountains Fund supported strategic planning for Main Street Skowhegan that led to Run of River as a top town priority.

“It’s been a great responsibility, not only as a business owner but a person in the community, to be the eyes and ears for the Maine Community Foundation and in particular the Western Mountains Committee,” DuBois says. With all of their differences in backgrounds, DuBois says members of the Western Mountains Committee share a common goal: making their communities better places to live, work and play.



THE HOUSE THAT TEENS BUILT

After months of work through snow and mud, students from Foster Career and Technical Education Center in Farmington completed their home replacement project featured last spring in *Maine Ties*. Pam and Joe St. Pierre of Chesterville joined the 25th anniversary reception for MaineCF’s Western Mountains Fund in September to view MaineCF’s new video about their home, *Breaking Ground*. The video is posted on the Western Mountains Fund page of www.mainecef.org. Western Maine Community Action led the pilot project, which was funded in part by a grant from the Western Mountains Fund.



Above, Joe and Pam St. Pierre’s old home, background, was demolished after students built a replacement home just 10 feet away.

Photo of new home courtesy Western Maine Community Action.

WELCOME TO THE BOARD

*Sarah Armentrout and Adilah Muhammad
are committed to community.*

The Maine Community Foundation Board of Directors has elected two new members: Sarah Chappell Armentrout of Lyman and Adilah S. Muhammad of Lewiston. “We are very pleased to welcome Sarah and Adilah to the board,” said chair Peter Lamb. “Both know the foundation well and bring a wealth of experience, perspective, and creative energy.”

Armentrout co-founded Carlisle Academy Integrative Equine Therapy & Sports, an equestrian school in Lyman that serves individuals with and without special needs, from clinical services to recreational riding and Paralympic sports. She has been in the field of equine-assisted therapy for 20 years and is a PATH International Advanced Riding Instructor and Mentor.

Prior to Carlisle Academy, Armentrout worked in communications for Tom’s of Maine. She has served for nine years on MaineCF’s York County Committee, including as chair. She is a graduate of Trinity College in Hartford, Connecticut.

A strategic planning and research consultant, Muhammad is principal at Scorecard Strategic Planning and Research in Lewiston. She has facilitated community change efforts between faith-based and public institutions at the local, state, and national level.

Muhammad is past chair of the Lewiston Downtown Neighborhood Action Committee and Task Force and serves on the boards of L/A Arts and Raise-Op Housing Cooperative. She is a graduate of DePauw University and holds a master’s from the Muskie School of Public Service at the University of Southern Maine.

How has your background informed what community means to you and how you define it?



Sarah Chappell Armentrout grooms a horse at Carlisle Academy Integrative Equine Therapy & Sports in Lyman.

As a person growing up in an entrepreneurial family in Maine, I was always proud of the resourcefulness and ingenuity of the people who inhabit this great state. I drew strength from its many natural resources, and when it was time to return and raise my own family, it was the strong sense of community and natural beauty that called me home.

It is through this lens that I look at the work of the Maine Community Foundation, which, for me, is about being a good steward of our collective treasure while simultaneously fostering innovation and bold solutions to the challenges that we face.

– Sarah Chappell Armentrout



Adilah S. Muhammad visits L/A Arts in Lewiston, where she serves on the board. The baskets are from the exhibition "Journeys of the Hand: Artisans from Africa." She stands in front of a painting by Waterville artist Jeff Jacques.

As an organizational consultant and real estate investor, I have long been fascinated with the intersections of poverty and prosperity. My interest in nonprofit work grew out of my desire to better understand how to responsibly pursue my own economic self-interest while engaging in service to the community. Investing in housing alone is not enough to meaningfully shape people's lives. However, I found that supporting nonprofit institutions invested in individual and community growth provides the holistic framework for a sounder investment.

Although I find community in many traditional forms, I am most often drawn to the large community of change-makers working throughout the state. It's in this community of people that I feel whole. Thus, my community spans from southern Maine to Presque Isle across a network of people all looking to make full investments in their own cities and towns.

– Adilah S. Muhammad

FRAMING THE CHARITABLE DISCUSSION

Bangor attorney Nat Putnam explains how he works with clients to weave their charitable goals into estate planning.



MaineCF: In your role as a trusts and estates attorney, what sort of conversations do you have with your clients about their charitable giving?

Nat Putnam: I like to raise the issue of charitable giving with every client as part of the initial meeting. I typically ask whether there are any charities the client wants to benefit as part of their estate plan. If there aren't, that usually is the end of the discussion. If the client identifies specific charities they want to benefit, my job is to help them refine their objectives into a definitive plan.

When the client is charitably inclined but doesn't know what organizations to support, I will typically frame the discussion around what charities they give to on an annual basis, whether they are a member of a board of directors, or if they volunteer for an organization. These questions begin to help the client focus on what they are passionate about and what difference they would like to make.

MaineCF: Once they have decided that they want to make a gift, what kind of assets do you propose they use?

Putnam: A lot depends on whether it is going to be a lifetime gift or one that takes effect after death. I am a big advocate for funding charitable gifts with tax-deferred accounts, such as IRAs and 401ks, because of the tax efficiency. For example, if the objective is to give \$100,000 to a charity and we have a choice of assets, I typically recommend that we fund that gift with an IRA because this prevents the non-charitable beneficiaries of the client's estate – usually the kids – from having to pay income tax on the distributions from the IRA. In other cases, the gift may involve a particular asset, say a piece of real estate. If someone has attractive timberland that they don't see passing to their kids, that would obviously be where we would focus and look at the most tax-efficient manner to make the gift.

MaineCF: Can you give us some examples of circumstances when you've found it helpful to turn to the Maine Community Foundation as a resource?

Putnam: I work with a lot of families that are interested in setting up family foundations and I've set up a number over the years. But there is a lot of complexity and expense in creating a foundation and once it is set up you have to maintain it. You have to understand the complicated tax rules that apply to foundations and be able to identify situations that are going to raise concerns. You also have to file an annual tax return, and you have to do the heavy lifting of deciding what organizations you are going to support each year.

In a lot of cases, families decide they want to create a legacy, but they really don't want to incur the expense and the work it takes to maintain a foundation. In that case, a donor-advised fund is the perfect solution.

Even though several other organizations administer donor-advised funds, the Maine Community Foundation really is the organization that has its finger on the pulse of what's going on in Maine. So if a client's objective is to benefit organizations that are based in Maine and make a difference in Maine, I don't think there's another organization that does that better than the Maine Community Foundation.

Nathaniel S. Putnam, Esq., is chair of the Estate Planning and Wealth Transfer Planning Department at Eaton Peabody in Bangor. His practice is focused on estate planning, trust and estate administration, and planning for owners of closely held businesses. He is a member of the Maine, Massachusetts, and District of Columbia bar associations. In 2012, Putnam was elected a fellow of the American College of Trust and Estate Counsel.

Attorney Nat Putnam of Bangor works with estate clients to identify their passions and how they'd like to make a difference.

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LET'S START AT THE VERY BEGINNING

*MaineCF's Invest in Maine Summit will focus
on our youngest – and Maine's future*

They may not realize it now, but Maine's youngest children hold the key to our future economy as they acquire knowledge, skills, judgment, and creativity. Unfortunately, the early experiences of too many children adversely affect their ability to excel.

That's why MaineCF's annual luncheon and summit on November 14 will focus on our youngest children and their families. Please join us at the Cross Insurance Center in Bangor, 11:30 a.m. to 2:30 p.m., as we explore why a strong start for all children is the key to building Maine's workforce, communities, and economy.

Presenters include:

Eric Brown, MD

Center for Family Medicine – Eastern Maine Medical Center

Susan Corbett, CEO

Axiom Technologies

Eric Haley, Superintendent of Schools

Kennebec Valley Consolidated Schools

Chris Emmons, President & CEO

Gorham Savings Bank

Larry Shaw, President & CEO

MMG Insurance

Laurie Lachance, President

Thomas College

A link to registration is at the bottom of our home page, mainecf.org.