

Maine Ties



Photo Karen Oakes

Patricia Lundholm and Ted Johanson at their home on Vinalhaven.

“IT’S WICKED FUN TO GIVE”

Vinalhavers Ted Johanson and Patricia Lundholm: Committed to Community

As a young man, Ted Johanson split his time between working at his family’s shoe factory near Swampscott, Massachusetts, and hauling lobster traps. Although he loved life on the water, his experience in the family business ultimately brought him to his livelihood: In 1963 he launched Falcon Shoe in Lewiston-Auburn.

Meanwhile, Philadelphia-born Patricia Lundholm served as a VISTA volunteer following college. She eventually moved to Maine and found a job at Falcon Shoe through a temp agency. She took charge

of the company’s computer operations. And somewhere along the way, she and Johanson married.

When Johanson sold Falcon Shoe in 1999, the couple retired to Vinalhaven. Selling the business gave them the means to be more philanthropic. “We’re kind of modest people, but all of a sudden we had some tangible assets that we never had before,” says Johanson. Almost as soon as the sale went through, they established a donor-advised fund with the Maine Community Foundation. The couple chose

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the foundation because, says Johanson, they wanted to be able to support "people you can touch, reach out to, people whose faces we can see."

While Johanson and Lundholm support larger institutions like Maine Public Broadcasting and Maine Coast Heritage Trust, they direct most of their philanthropic dollars to Vinalhaven. The very survival of this year-round community, they believe, depends upon having a thriving school, a reliable medical center, and protection of its extraordinary natural environment.

When they were running Falcon Shoe, the couple hadn't been able to devote as much time to volunteering as they would have liked. Now they relish the opportunity to engage with the island community. Lundholm has been interim town manager and a member of the board of selectmen. She joined the ambulance service and will soon be its chief. Johanson

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has been president of Vinalhaven's medical center and served as the town's water and sewer commissioner.

"It's wicked fun to give," says Lundholm. Johanson agrees, adding, "Both of us feel an obligation to the community. That's probably why we're married."

Vinalhaven Land Trust is conducting a capital campaign to purchase and preserve Big Tiptoe Mountain, a favorite spot for islanders to take in sweeping western views of Penobscot Bay, but also a property rich in biodiversity. The campaign, part of the trust's 25th anniversary celebration, includes the creation of an endowment for sustained stewardship. Johanson and Lundholm have supported the Vinalhaven Land Trust through their donor-advised fund at the Maine Community Foundation.



Photo Kerry Hardy, courtesy Vinalhaven Land Trust



Photo Andy Molloy

Meredith Jones (center left) confers with Laurie Lachance before the latter's inauguration as the fifth president of Thomas College in Waterville.

FRAMING OUR FUTURE

Leadership, Education, Place: Towards a Thriving Maine Economy

Meredith Jones, *President and CEO*

I learned a great deal from the very smart woman who hired me in late 1999 to head up program and grantmaking at the Maine Community Foundation. Among other lessons, Marion Kane helped me understand philanthropy's role in building strong, vibrant communities throughout the state.

As the community foundation launches a new strategic framework to guide our work, I think Marion, who died this past summer, would be proud of our vision, which reaches into the next decade and recognizes the importance of flexibility to adapt to changing circumstances.

The Maine Community Foundation believes that focusing on leadership, education, and our special places—both in communities and the larger landscape—holds the greatest promise for philanthropy's contribution to our

"The future is exciting—and daunting—and this new blueprint will inspire us to excellence and creative endeavors in the years ahead."

vision for a thriving Maine economy.

Look for us to work in new ways to mobilize people and resources to effect positive change for Maine. While Maine has a number of exceptional leadership training programs, the issues the state is facing require more leaders with more skills.

Look for us to communicate in new ways the work we are doing to increase

post-secondary education and skills attainment rates of Maine people. Evidence suggests that increasing these rates is critical to strengthening Maine's economy, communities, and families.

And look for us to demonstrate how new tools can help community centers and the environment flourish. The foundation will support community centers that bring social and economic benefits while preserving Maine's natural resources.

The future is exciting—and daunting—and this new blueprint will inspire us to excellence and creative endeavors in the years ahead. As we think about the community foundation as a more visible and vocal catalyst for change, we invite you to share your stories of building communities across Maine. Join us in creating the future we all want.

Leadership, Education, Place

The heart of the Maine Community Foundation's work is our commitment to join with donors and other partners to improve the quality of life for Maine people. We believe a high quality of life means having an economy that is strong and sustainable; an educated workforce for our times; communities that are enriched by thriving cultural, social, and recreational activities; resources available to help welcome new residents and retain current ones; and an environment that is conserved for future generations.

We believe in the importance of leadership, education, and place.

—Meredith Jones, President and CEO

The 10 students in the 2012 Maine Youth Wilderness Leadership Program hike across the Katahdin Tableland.

The program received support from the Big FUN(d), a donor-advised fund at the Maine Community Foundation.

Photo Aislinn Sarnacki, courtesy Bangor Daily News



LEADERSHIP

A Katahdin trek builds leaders

For the past four years, Friends of Baxter State Park, in partnership with the Chewonki Foundation, has sponsored the Maine Youth Wilderness Leadership Program. Ten high school sophomores and juniors—five girls, five boys—from all parts of the state embark on a nine-day backpacking trip that takes them across Baxter State Park, including a climb to the top of Mount Katahdin.

The August trek promotes the values of wilderness preservation. The students meet with individuals who are steeped in the history and culture of the region, from park naturalist Jean Hoekwater to Penobscot tribal leader and educator Barry Dana. Through science, art, photography, writing, recreation, history, and storytelling, they gain an appreciation of the park's wild lands.

These future stewards of wilderness return to their schools having learned many important lessons in leadership, including the need to listen and work together. As one participant put it, in the course of the trip “the egos died a little bit.”

EDUCATION

Putting a dent in (dental) college debt

College debt can be a major obstacle to accessing higher education in Maine. As Cherie Galyean, scholarship manager at the Maine Community Foundation, noted in a *Bangor Daily News* op-ed, “Maine’s college class of 2009... had a whopping [average] debt load of \$29, 143.”

The more than 400 scholarship funds established by community foundation donors have put a dent in that debt. Case in point: Kacee Johnson, a single mother from Hermon who graduated from Islesboro Central School in 2001, was able to return to school with help from several foundation scholarships.

In 2010, Johnson enrolled in the Dental Assisting Program at the University of Maine at Augusta’s Bangor campus. After graduating *magna cum laude* and receiving the Dental Assisting Student of the Year award in May 2012, she was hired by the Penobscot Community Dental Clinic in Bangor.

PLACE

Kingfield POPS!

Launched in 2003 as a project of the Mt. Abram Economic Development Association to draw tourists to western Maine, Kingfield POPS created an event—an annual concert—that would also promote music in the local schools and enhance the quality of life for residents.

In 2012, the POPS celebrated its 10th and most successful year. In addition to putting on a stellar concert, they added an exciting musical element to Kingfield’s First Friday Artwalks, with support from a grant from the community foundation’s Expansion Arts Fund. Participation in the Artwalks, says POPS Executive Director Deborah Sutton Robie, has enabled the group to focus more on economic development, by working with businesses and other organizations in the region.

A grant from the foundation’s Western Mountains Fund (which is marking its 20th anniversary this year) will help Kingfield POPS plan its next decade: more music, increased economic benefits, and greater quality of life.



Kacee Johnson prepares to see patients at the Penobscot Community Dental Clinic in Bangor. Photo James Daigle



The POPS 10th anniversary concert, held at the Kennedy Farm in Kingfield, featured Noel Paul Stookey (of Peter, Paul, and Mary) and the Bangor Symphony Orchestra. Photo Tim Byrne Photography

Helping Clients Focus on the Fun Part

In her role as financial advisor, Portland attorney Amanda Rand helps her clients make the most of their charitable giving. As she tells Director of Philanthropic Services Jennifer Southard, Rand considers the Maine Community Foundation to be an important resource in her work—more a complement than a competitor.

MaineCF: Could you talk a little bit about your career path?

Amanda Rand: I started as a practicing lawyer in Boston at Ropes & Gray, working in their trusts and estates group, advising individuals and families on all aspects of estate planning, including their charitable giving goals. I later moved home to Portland and served a similar role at Pierce Atwood for about three years and then with Betsey McCandless, a sole trusts and estates practitioner. I joined Spinnaker Trust about four years ago and shifted to advising clients on total wealth management. I focus on advice, strategy, planning, and getting to the heart of what a client wants to do with their money, which frequently involves charitable giving.

MaineCF: What kind of interactions have you had with the community foundation?

Rand: I have used the foundation as a tool to give to clients—as a resource for organizing their philanthropy without



Photo Meggie Booth

A native of Falmouth, Maine, Amanda Rand is a senior vice president at Spinnaker Trust, charged with developing and servicing client relationships with a particular focus on tax planning and wealth transfer strategies. Rand earned a BA from Duke University and a law degree from Harvard Law School. She serves on the Board of Directors of the Center for Grieving Children. She is a member of the Maine Estate Planning Council, the Maine Medical Center Planned Giving Committee, and the Trusts and Estates Section of the Maine Bar Association. She lives in Falmouth with her husband and their three children.

setting up a whole new structure like a private foundation. The community foundation takes care of the administrative work, which allows clients to focus their efforts on the fun part: giving money away.

Last year I joined the advisory board for the Vincent B. and Barbara G. Welch Foundation. The Welch trustees had recently converted their private foundation into a supporting organization at the Maine Community Foundation for just that reason: to spend more time on grantmaking and less on administration.

MaineCF: When I've met with trust companies, everyone is friendly, but I sometimes get the comment that we're competitors. How do you view this?

Rand: I think trust companies and the Maine Community Foundation complement one another rather than compete. We manage money like you, but there are instances where it makes sense to tell our clients how the community foundation can help them meet their charitable goals.

MaineCF: We have many donors who work with multiple advisors and charitable

structures, so it's not an all-or-nothing relationship.

Rand: Exactly. The community foundation can be a huge benefit to our clients. You have relationships all over the state and you're able to help people who need some guidance in selecting organizations that will help them meet their charitable goals.

"The community foundation takes care of the administrative work, which allows clients to focus their efforts on the fun part: giving money away."

The foundation's staff is great to work with, and the volunteers on the board are incredibly dedicated folks that are committed to its mission. Maine is better off for the foundation's presence and for the people who are leading it.

The Charitable Gift Annuity—Why Now?

Are you looking for a way to create a guaranteed income for you or someone else and, at the same time, accomplish your charitable objectives? With low interest rates and a volatile investment market, now is a great time to consider a charitable gift annuity. The current annuity rate* is 4.7% if you're 65 years old. The rate increases to 5.1% if you're 70, to 5.8% if you're 75, and to 6.8% if you're 80. The minimum gift amount is \$25,000.

For more information, contact Karen Hartt or Jennifer Southard at (877) 700-6800.

*based on August 2012 rates

NEW TO THE BOARD

Mills, Roosevelt, and Stanley: Cross-sector Experience and Leadership Skills

The Maine Community Foundation has elected three members to its Board of Directors: Peter Mills of Cornville, Anna Eleanor Roosevelt of Embden, and Karen W. Stanley of Castine.

A Maine native, Mills is executive director of the Maine Turnpike Authority. He was a founding member of the Somerset Economic Development Corporation and FirstPark, an innovative economic development project of the Kennebec Regional Development Authority. Mills served in the Maine Legislature for 16 years, in the House and Senate.

Roosevelt joined Goodwill Industries of Northern New England as CEO after 10 years at the Boeing Company where she was vice president of global corporate citizenship. She is a board member of Net Impact, chair of the Roosevelt Institute's board, and an advisory board member for the Joan B. Kroc Institute for International Peace Studies.

Stanley is chair of Camden National Bank. Prior to that, she was a member of the senior management team at Priority Management, an international training and development firm. She has been involved with community and civic organizations, including Hospice of Hancock County and



Photo Jim Dugan

At the Lighthouse Museum in Rockland (left to right): Peter Mills; Karen Stanley; MaineCF President and CEO Meredith Jones; Eileen Epstein, Board Chair; Anne Roosevelt; and George Shaw, Board Vice Chair.

Maine Coast Memorial Hospital. She chairs the community foundation's Hancock County Committee and its County Council.

"The statewide Board of Directors plays a crucial role in guiding our work,"

said Maine Community Foundation President and CEO Meredith Jones. "These distinguished individuals will lend special expertise as we head into our 30th year."

Senator Snowe's Leadership Gift

On July 13 Maine Senator Olympia Snowe announced that she would donate \$1.3 million of her remaining campaign funds to the Maine Community Foundation to create a women's leadership institute. "I look forward to continuing to contribute to the development of young women in Maine through this new institute, and, hopefully, inspiring them to participate in public service," Snowe said.

"Senator Snowe's plan to create a women's leadership institute aligns with one of the Maine Community Foundation's priorities: to develop new leadership in Maine," said President and CEO Meredith Jones. "We are honored that she chose to partner with the Maine Community Foundation as she completes her distinguished career in the U.S. Senate."

Senator Snowe received the 2012 Maine Women as Leaders Lifetime Achievement Award from the Maine Women's Policy Center in September.



Photo courtesy Senator Snowe



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Inspiring Philanthropy



Photo courtesy DLA Piper

AN EDUCATED MAINE

An Evening with Senator George J. Mitchell

When Senator George Mitchell decided not to run again for the U.S. Senate in 1995, he directed part of his campaign funds to the Maine Community Foundation. Those funds formed the basis of the Mitchell Scholarship Research Institute, which has provided financial support to nearly 2,000 college-bound Maine students.

On November 26 at the University of Southern Maine's Abromson Center, community foundation President and CEO Meredith Jones will engage Senator Mitchell in a conversation focused on the importance of education to the future of Maine. To RSVP, visit www.mainecef.org.

"No one should be guaranteed success...but everyone should have a fair chance to succeed."

—Senator George J. Mitchell