

Maine Ties

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Legacies for Maine

Merton Henry: An estate lawyer makes recommendations and a special bequest

Although well into his seventies, Merton Henry goes to his Portland law office daily, continuing the estate practice that 25 years ago brought him into contact with the Maine Community Foundation.

Born in Hampden, Maine, just outside Bangor, Henry moved to South Portland when he was 14 and later graduated from Bowdoin College, the first of his family to receive a BA degree. He left the state for law school, but he always expected to return.

Once ensconced in his law practice, Henry says getting involved in the community was a given. "It's a lawyer's responsibility," he states. Commendations on the wall of his office testify to years of public service by him and his late wife, Judge Harriet P. Henry.

As an estate lawyer who served on the MCF board for nine years, Henry finds himself recommending the foundation when clients have an interest in supporting Maine nonprofits. "MCF has had an extraordinary track record for investments," he notes.

Henry has also recommended the foundation to clients who may be thinking about starting a private foundation. He recalls a successful Wall Street lawyer who had been helping local



Merton Henry, Esq., at the offices of Jensen Baird Gardner & Henry on Free Street in Portland.

libraries and historical societies. The family wanted to continue this giving in perpetuity, and came to Henry to establish a foundation with a little more than a million dollars. "I told them, 'You don't want a foundation, you want a donor-advised fund.'" Now, every year, a committee consisting of the lawyer's children and friends reviews grants with MCF staff members, continuing his philanthropy.

Henry also finds himself suggesting the foundation when clients have a cause, but there is no appropriate institution handling the issue. "In that case,

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Legacies for Maine *Merton Henry continued*

I have encouraged people to set up a fund at MCF and let them get proposals and make grants according to some sort of discipline," he explains. "Discipline in grantmaking is very important," he adds.

"MCF knows Maine as well as any institution in the state," Henry states. He points to its statewide mission, vision and presence. "It's one of the reasons I'm so enthused about it: the foundation probably has a better handle in both urban and very rural areas than any other organization in the state today." Henry cites the creation of the Maine Compact for Higher Education as an

"MCF knows Maine as well as any institution in the state."

example of how MCF can help bring about change on a large scale.

"MCF has an extraordinarily talented staff and board," Henry concludes. "It's the largest group of people that I know of in Maine who are really focused on building and dispersing philanthropic resources."

Henry has a bequest to MCF in his estate. His legacy is completely unrestricted—a token of his trust in the foundation, and of his wish to build up MCF's unrestricted endowment. "The board will know where the needs are," he says with a certainty born of experience and expertise.

Laptops and Other Legacies

Former Governor Angus King shared reflections on philanthropy's impact on Maine at MCF's annual Legacies for Maine luncheon held at the Lucerne Inn in June. King's own legacy to the state includes the laptops in the schools program. To support programs related to the laptop initiative, King helped establish the Maine Learning Technology Fund at the Maine Community Foundation.

Governor King also serves as a mentor for the foundation's Maine Policy Scholars Program, which was established in 1995 by Peter Cox, co-founder of *Maine Times*. The program, which is administered by MCF and the Muskie School of



Photo: Bob DeLong

Public Service, offers undergraduates at the campuses of the University of Maine the opportunity to use their intellectual skills to solve real problems in the real world. The program graduated another class of scholars earlier in the summer.



Photo: Carl Little

The Maine Community Foundation and Common Good Ventures hosted a special luncheon, “Partnerships for Stronger Nonprofits,” at Colby College in June. The gathering included a ceremony to honor the three “graduating” nonprofit partners ending a three-year association with MCF and CGV.

Left to right: Henry Schmelzer, MCF; Russell Libby and Heather Spaulding, Maine Organic Farmers & Gardeners Association; Richard D’Abate, Maine Historical Society; Kristen Majeska, CVG; and Gilda Nardone, Women, Work and Community.

High Engagement Philanthropy

Nonprofits receive grants plus management training

The Maine Community Foundation and Common Good Ventures have selected three Maine nonprofits to receive support focused on improving organizational strength: the YWCA of Greater Portland, the Maine Alzheimer’s Association and Jobs for Maine’s Graduates. Each organization will receive a \$15,000 grant from MCF and dedicated management and staff coaching from CGV.

“Our capacity-building program was created to help good nonprofits get better at what they do,” said Henry Schmelzer, MCF president. “We hope that more individual donors and foundations see the lasting benefits of capacity building and include this strategy in their grant-making portfolios,” he said.

Kristin Majeska, president of Common Good Ventures, added,

“Thanks to an intensive selection process, we know that these three Maine nonprofits are poised to adopt best business practices. They are determined to improve their performance, their financial sustainability and, ultimately, their ability to serve Maine people and their communities more efficiently.”

This past spring, the first group of nonprofit partners—the Maine Historical Society, Women, Work and Community, and the Maine Organic Farmers and Gardeners Association—ended a three-year association with MCF and CGV. Two organizations—the Eastern Agency on Aging and the Maine Center for Economic Policy—are continuing their partnerships.

New Nonprofit Partners

THE GREATER PORTLAND YWCA offers housing and multiple services to homeless and at-risk women and their families enabling them to stay healthy and become more self-sufficient. Support from MCF and CGV will enable the YWCA to analyze current program results and conduct a facilities review as part of a strategic plan to position the organization for long-term financial sustainability.

THE MAINE ALZHEIMER’S ASSOCIATION supports research, works to improve care for persons with Alzheimer’s and provides critical information and support to their families and caregivers throughout Maine. Through the MCF and CGV partnership, the association will create more efficient systems for delivering client services through technology and process improvement as it broadens its funding base and diversifies its revenue streams.

JOBS FOR MAINE’S GRADUATES helps more than 2,500 students each year to develop the skills, attitude and aspirations to succeed in school and the workforce. MCF and CVG will work with JMG as it develops research and analysis techniques to better understand the barriers to education and employment faced by an increasing number of Maine’s youth.

Maine Theater Fund *To keep theater “alive and thriving”*

Recognizing the connection between vibrant communities and support for the arts, two anonymous donors have established the Maine Theater Fund at the Maine Community Foundation.

“We both love live theater and have seen it struggle for existence throughout America,” said the donors. “There are many fine professional and community theaters throughout

Maine run by dedicated, hard-working people who share a passion for this art. Our goal in establishing this fund is to do a small part to keep theater alive and thriving here in our state.”

The goal of the \$1 million fund is to strengthen and sustain theater performance throughout Maine. The fund will make grants of up to \$20,000 to support organizations whose activity is the production or presentation

of live theater. This includes professional and community theaters.

“There’s a movement in Maine to promote activities that nurture a creative economy and this new fund will play a role in that important initiative,” Henry Schmelzer, MCF president, said. Last year, the foundation received the Leadership in Arts Philanthropy award from the Maine College of Art and made more than \$900,000 in arts-related grants.



Photo: Sarah Sutter

Hayley Mason as Bride and Caleb Lacey as Leonardo in a scene from the Heartwood Regional Theater Company’s production of Federico Garcia Lorca’s tragedy Blood Wedding. Directed by Griff Braley, Heartwood’s artistic director, the production incorporated live flamenco guitar. The play, which was put on at the Wiscasset High School, received grants from MCF, the Libra Foundation and the Davis Foundation.

A Special Dedication

Wrendy Hayne Remembered

On April 21, in a special ceremony, two granite benches and a tree were dedicated at the Riverview Psychiatric Center in Augusta in memory of Wrendy Hayne. Governor John Baldacci joined Haynes’ parents, Don and Janice Burns, at the dedication. “With the gift of these benches,” the Governor said, “hopefully people can sit and reflect on Wrendy’s contributions to us all.”

Hayne was murdered in 1996

while a patient at the Augusta Mental Health Institute. The family received a \$620,000 settlement, \$100,000 of which was used to establish the Wrendy Hayne Mental Health Fund at MCF.

The fund has made 20 grants totaling nearly \$30,000 to support projects and programs that help people with mental illness. Recent grants went to School Union #106 in Calais for the Summer Olympics and the

Portland Coalition for the Psychiatrically Labeled for a creative writing seminar.



Governor John Baldacci and Don and Janice Burns do the ribbon-cutting honors at a special ceremony in honor of Wrendy Hayne (1962-1996).

Photo: Pamela Cleghorn

“To make important grants at crucial times”

Stewardship Fund supports Forest Society of Maine

The Forest Society of Maine Northern Forest Stewardship Fund, established by Richard Hoffman this past spring, supports the monitoring and stewardship of conservation easements and lands associated with the society’s West Branch Project, the largest contiguous tract of land ever conserved in Maine.

At a presentation at the society’s headquarters in Bangor, Hoffman praised Maine Community Foundation for providing him with “timely advice and support” that enabled him “to make important grants at crucial times to the Forest Society of Maine in support of easement projects and other programs.”

Hoffman also advises the Maine Northern Forest Fund, a donor-advised fund that has focused on protecting large tracts of working forest through conservation agreements.

Since its inception in 1984, the Forest Society of Maine has helped to conserve nearly 400,000 acres of forestland. FSM’s director, Alan Hutchinson, received the 2005 International Paper Conservation Partnership Award from the Conservation Fund. The award is presented annually to an individual who has achieved significant results in the protection of



Photo: Carl Little

Left to right: Alan Hutchinson, Executive Director, Forest Society of Maine; Ellen Pope, MCF Vice President, Philanthropic Services; and Richard Hoffman, donor.

habitat through a cooperative relationship with a business or company. The Conservation Fund cited FSM’s partnership effort on the 20,000-acre Nicaous Lake easement; the campaign to acquire Big Spencer Mountain and six miles of undeveloped shoreline on Moosehead Lake; and the West Branch campaign that permanently conserved 329,000 acres of forest.

“My donor-advised fund has achieved results beyond my wildest dreams,” Hoffman said. He hopes that his new fund will inspire other donors to consider supporting the work of the Forest Society of Maine.

A Court at Frenchboro

Basketball builds community

Building community in Maine is accomplished in many different ways. For Frenchboro, Long Island, in Penobscot Bay, a new basketball court will play a role, offering a resource for healthy recreation and community interaction.

The Town of Frenchboro recently received a \$7,500 grant to build a regulation-size basket-

ball court next to its community building. The court will be used for other games, such as volleyball, and be turned into an ice-skating rink in winter.

The grant came from three different sources: the Hancock County Fund and the Emily and William Muir Community Fund II at MCF, and donor Edward McC. Blair.



On the dock at Frenchboro, Edward McC. Blair presents a \$7,500 grant to Linda Lunt, a member of the island’s Board of Selectmen, as Ann Waldron of MCF’s Hancock County Committee looks on.

Professional Advisor

Joel Davis is a Senior Financial Advisor for Ameriprise Financial Services, Inc. in Augusta, Maine. Davis specializes in comprehensive financial, estate and charitable planning for both personal and business clients.



Bringing Out the Passion in Philanthropy

Joel Davis likes to encourage his colleagues in the financial advisor field to talk about philanthropy with their clients. A popular speaker on a variety of estate planning topics, Davis presents a strong case for the important role a financial advisor may play in bringing out the philanthropic passion in his or her clients.

Davis is a graduate of the University of Massachusetts and received a Masters Degree with Honors in Resource Economics from the University of Maine at Orono. He also received a Master of Science Degree in Financial Services from the College of Financial Planning. He is a member of the National Association of Philanthropic Planners and the Maine Planned Giving Council, and he serves on the advisory board of the Maine Women's Fund and Maine Initiatives.

Speaking with Jennifer Southard, Director of Philanthropic Services at the Maine Community Foundation, Davis expressed his desire to "incite and enhance" philanthropy.

MCF: What do you see as your role as a financial advisor in talking about philanthropy with your clients?

Davis: When I look at the discussion that a wide range of advisors have with clients about philanthropy, perhaps the most critical linkage is the financial advisor. I have had this discussion with many estate planning attorneys, and I ask them, "Why don't you talk with clients about charity, about philanthropy?" And oftentimes they say, "It's not my place." The accountants may say the same thing. Then I may remind them, "Isn't an attorney a counselor? Aren't you supposed to offer counsel?" Usually they say, "Only when my clients ask."

I think clients want to be asked. I think they have a passion. It's that intersection between their passion and their pocketbook that creates a legacy solution, particularly around family values—not my values, not your values, but what their passion is all about. And it doesn't take much to ignite that passion. It's a simple discussion about children, about family, about father and mother and aunt and uncle.

I think it's a very crucial conversation. You can discern very quickly in that conversation about where their passion is. I know their financial situation. I know whether they have capacity; sometimes they want to create capacity through vehicles such as charitable trusts.

The tools and techniques are part of the conversation, but they are not everything. Advisors should include in that conversation the names of organizations with community value.

MCF: Do you have any favorite questions you ask a client?

Davis: I might start with a simple question, "Have you ever given money to an organization?" I try to look at the family histories for patterns, things that have affected them. The more you understand the stories, the better you can advise the client. For a person who values education, for example, why not consider setting up a scholarship program? It is what the client values that counts. They like the idea of leaving a legacy, not only for themselves, but also for their family. You have to make sure that you give your clients clear, unbiased advice.

MCF: Do you have a favorite story?

Davis: All the stories are my favorites. Each time you make a change in the nature of someone's thinking, you may be able to cascade that change through the generations. I think that more advisors like myself can make a substantial difference in the community by starting these conversations about passion and legacy. You can incite and enhance philanthropy. It's about the value proposition that the individual brings to the table.

Readings in Philanthropy

Joel Davis often suggests readings to his clients interested in learning more about philanthropy. He will even buy books in bulk and distribute them.

Here are a few of the titles on his list:

Andrew Carnegie, The Gospel of Wealth—“It talks about what Carnegie decided to do with his wealth in terms of his legacy, but also what he thought was appropriate for most people.”

Jim Stovall, Dawn Billings, The Ultimate Gift—“A story book, it’s about lessons learned, about transferred wealth, about the gift of understanding compassion.”

Amy A. Kass, editor, The Perfect Gift: The Philanthropic Imagination in Poetry and Prose—“It’s a great book, really out there.”

Gregory J. Englund, Beyond Death and Taxes—“Almost an academic book, but it has also inspired clients to do very complex thinking in estate planning.”

Money Talks, compiled by The Comfort Zone—“It’s for 20-year-olds; it’s young people talking about philanthropy—it’s really great.”

Deanne Stone, Building Family Unity Through Giving: The Story of the Namaste Foundation—“A very compelling book.”

Davis also recommends publications of the National Center for Family Philanthropy.

Robert Woodbury Elected Chair of MCF Board

“The foundation’s work has a multiplier effect in the state.”

Robert Woodbury of Harpswell, Maine, has been elected Chair of the Board of Directors of the Maine Community Foundation.

“It’s an honor to assume the leadership of the MCF board,” Woodbury said. “The foundation’s work has a multiplier effect in the state, inspiring philanthropy and helping to support sustainable nonprofits through networks and partnerships,” he said. He pointed to the Maine Compact for Higher Education, Common Good Ventures and the Maine Philanthropy Center as successful outcomes of MCF initiatives.

Henry Schmelzer, MCF president, hailed Woodbury’s appointment. “With the foundation’s commitment to education and promoting philanthropy in Maine, Bob will be a terrific asset to our efforts,” he said. “His leadership will be crucial to the foundation’s growth in the coming years.”

Woodbury served as Chancellor of the University of Maine System from 1986 to 1993, and then again in 1995. Prior to that

“With the foundation’s commitment to education and promoting philanthropy in Maine, Bob will be a terrific asset to our efforts.”

he was president of the University of Southern Maine for seven years. With a Ph.D. in American Studies from Yale University, he has taught at Caltech, the University of Massachusetts, the University of Maine System, and Amherst College.

Woodbury was founding chair of the Maine Public Broadcasting board. He serves on the board of the Maine Humanities Council and has been a board member of many organizations, including the Maine Development Foundation and both Eastern Maine Medical Center and Maine Medical Center.



Robert Woodbury at his home in Harpswell.

Photo: Troy R. Bennett

At www.mainecef.org

Immigrant Legal Advocacy Project *Outreach and Impact*

A grant from an anonymous donor through the Maine Community Foundation helped the Immigrant Legal Advocacy Project (ILAP) in Portland provide direct legal services to nearly 1,900 low-income Mainers in 2004. Additionally, over 1,300 individuals attended ILAP educational workshops, and the organization's impact work improved aspects of the environment for immigrants in Maine statewide. The individuals assisted came from 108 countries, with all 16 Maine counties represented.

ILAP serves indigent and low-income non-citizens and their U.S. citizen family members.

Its services include outreach to immigrant communities and to service providers regarding immigration law and policy.

ILAP also runs an immigration clinic offering attorney consultations and application assistance. Its *pro bono* Immigration Project provides brief intervention for persons with slight immigration complications. Full legal representation is also available for persons with complicated immigration problems. Last year 21 volunteer attorneys augmented ILAP's capacity by working on 47 full representation cases, donating over 950 hours of their time, worth over \$140,000.



The MCF donor has been especially impressed by ILAP's Impact Project, which involves policy work. She applauds the way in which the organization has made the move from providing services to individuals to "asking the crucial question, 'What do we have to do to prevent so many individuals from needing our services?'"



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