

# Maine Ties

News from the Maine Community Foundation

## Partners in Philanthropy:

### Empowering Youth to Strengthen Their Communities

After a hiatus of two years, the Maine Community Foundation's Partners In Philanthropy (PIP) program is back in business. PIP was re-launched this year with the help of the Knox and Androscoggin County Committees.

To implement the new PIP program, MCF-Knox County partnered with Youthlinks, a Rockland-based youth service organization, and the Diversity Coalition, a student organization at Camden Hills High School. MCF-Androscoggin County worked with the Jobs for Maine's Graduate program (JMG) at the Lewiston Regional Technical Center.

Both PIP committees met regularly during the school year to identify current and emerging issues within their communities and county that they would like to address through their grantmaking. Each group awarded \$5,000 in grants in the spring, using grant guidelines developed by the students.

In Knox County, the PIP student group, which adopted the name Youth2Youth, supported

projects involving youth. Preference was given to projects bringing youth together from multiple towns in the mid-coast region—from Rockland to Belfast, including inland areas—for social, artistic, service, environmental or community education and outreach activities. Grantees included Mainely Girls, Trekkers, Lincoln County Trailblazers, Teen Center and Circadia.

In Androscoggin County, the PIP committee, which calls itself JMG Grant-Makers, addressed prevention of, and response to, abuse as the focus of their grant-making activities. Grantees included Rockin'T Equine Rescue, Greater Androscoggin Humane Society and the Sexual Assault Resource Center.

The goal of the PIP program is to utilize the process of philanthropy to empower young people to strengthen their communities through grantmaking and leadership. The program strives to foster civic engagement and responsibility among youth committee members through the grantmaking process.



Photo: Peter Taylor

Youth representatives receive grants for their organizations from Youth2Youth, one of MCF's Partners in Philanthropy. Left to right: Chelsea Cartwright, Lincoln County Trailblazers; Freya Levett, Trekkers; Caitlin Coyle, Teen Center; Jessica McMahon, Mainely Girls; and Heather Ripley, Circadia.



## Maine Community Foundation

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## A Gathering of Founders and Friends

On July 21, the Maine Community Foundation hosted a Founder's Luncheon at the Surry Inn in Surry, Maine. Former foundation presidents **Edward Kaelber** and **Marion Kane**, as well as a number of special friends, were on hand to share reminiscences and to offer tributes. **Meredith Jones**, the foundation's vice president for program development and grant making services, provided an overview of the **Maine Compact for Higher Education**, a statewide initiative to increase college enrollment and completion by Maine students. The Compact was launched last year in partnership with the **Maine Development Foundation**.



Photo: Carl Little

Among those making toasts to MCF's 20th anniversary was Jack Blum, son of Robert Blum (1899-1999), whose guidance, wisdom and financial support gave birth to the foundation in 1983.

## Refreshed Website Launched

The Maine Community Foundation's website, [www.mainecef.org](http://www.mainecef.org), has a new look and a fresh feel. Much of the content has been rewritten and the website has been reorganized to maximize navigability.

Among the new graphics is a series of color photographs by **Jack Ledbetter**, a master of Maine landscape photography. A native of Albany, Georgia, Ledbetter has been working in Maine for more than twenty years. He maintains a studio and gallery on Mount Desert Island.



*Mount Katahdin from Chimney Pond, 1991*, is one of seven views of Maine by Jack Ledbetter featured on the MCF website.

## A Rangeley Retreat

The Maine Community Foundation's Board of Directors held its annual retreat in the Western Mountains town of Rangeley. In addition to putting the final touches on the foundation's 2004-2008 strategic plan, the board enjoyed a delightful community dinner hosted by MCF's **Western Mountains Committee**. **Nancy Perlson**, chair of the committee, acted as MC for the evening. Special guests included artist **Marguerite Robichaux**, a group of elementary school fiddlers and the **Flying Feet Dance Theatre**. Nearly a dozen area nonprofits set up displays.

In his welcoming address, board member **Reverend Scott Planting** from Farmington acknowledged the legacy of **King Cummings**, one of the founders of the Maine Community Foundation, "whose gift set up the Western Mountains Fund, and whose vision established the **Western Mountains Alliance**."

In highlighting the impact of MCF in the region, Planting noted that its grants help to spark "our own native resourcefulness, our own good ways to make life a little more livable. They give a little hope and help us see the way forward."



Photo: Carl Little

Board member **David King** (right), from Limestone, won the board retreat raffle: a bear cub carved with a chainsaw by local Rangeley legend **Rodney Richards**, "The Mad Whittler" (left). Proceeds from the raffle benefited the Western Mountains Fund.

## 20th Anniversary Annual Meeting

The Maine Community Foundation held its 20th anniversary Annual Meeting at the Kennebec Valley Community College in Fairfield on June 19. Highlights included a keynote address by **Dr. Carolyn Lukensmeyer**, founder and president of **America Speaks**, and a performance by **Flash in the Pans Steel Band** from Blue Hill.

Welcoming remarks were given by the chair of the foundation's board of directors, **Charles Roscoe**, and MCF president **Henry Schmelzer**. Roscoe acknowledged **Christopher Harte** of Portland and **Douglas Brown** of Camden, who have stepped down from the board, and welcomed three new members, **Anne Collins** of Northport, **William Keiffer III** of Bethel and **Calvin True** of

Brewer. He also welcomed the new chair of the Foundation board, **Wendy Penley**, from Norway, Maine, and vice chair **Robert Woodbury** of Harpswell. In paying tribute to MCF founders, Schmelzer quoted a congratulatory letter from former **Maine Governor Ken Curtis**, who wrote, "The Maine Community Foundation has truly made a difference."



Photo: David Leeming

In her keynote address, titled "Creating Community and Revitalizing Democracy: Our Shared Leadership Challenge," Dr. Carolyn Lukensmeyer described the "electronic town meeting" she helped facilitate in New York City to decide on the future of Ground Zero.

**Woodbury**, chair of the foundation's Program Committee, presented the **2003 Elizabeth Noyce Award for Nonprofit Excellence** to the **Unity Barn Raisers** (UBR). State Representative **John Piotti**, executive director of the UBR, accepted the award, which includes a \$5,000 unrestricted grant.

For the second year running, as part of the annual meeting the foundation hosted an afternoon forum. "Maine Communities in 2020: Reflections on the Future" was moderated by Dr. Lukensmeyer and featured **Shalom Odokara**, Executive Director, **Women In Need**; **Mary Anne Alhadeff**, President of **Maine Public Broadcasting**; and the **Honorable Daniel E. Wathen**, former Chief Justice, State of Maine.

# Professional Advisor

## Advise and Consent: Client Choice in Giving

The phone rang last December, as it does often at that time of year, and an attorney friend of the Maine Community Foundation said he had clients who wanted to handle their philanthropy differently and who also had tax considerations. We chatted and I offered to meet with the couple. "They're here in my office now," he said, "shall I put you on speaker phone?" Within a day or so, we had crafted an advised fund for the couple, which they now use to make grants to not-for-profit organizations.



Ellen Pope is Vice President for Donor Relations for the Maine Community Foundation.

News about advised funds seems to be everywhere. With the possibility of more stringent federal regulations for private foundations and some states considering imposing a seven or eight-figure minimum to establish them, donor-advised funds continue to represent an economical, flexible alternative for individual and family philanthropy.

Are advised funds the right option for your philanthropic clients? Consider the advantages. They are simple to set up, for one. A brief document spells out the terms of the fund. Once the fund is capitalized with a contribution of cash, securities or other property (yes, advised funds accept real estate and other tangible property), the fund advisors are ready to begin grantmaking. And advised funds offer advantageous tax treatment.

A recent article in *The Journal of Gift Planning* re-kindled interest

in the intergenerational transfer of wealth, made a hot topic among estate and philanthropic advisors in 1999 by John Havens and Paul Schervish with the release of the report, *Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and Prospects for a Golden Age of Philanthropy*. The new report, also by Havens and Schervish, suggests that the value of estates in that period will be between \$41 trillion and \$136 trillion, depending on the model factor, which ranges from 2% to 4% of secular real growth in wealth. That translates to an estimated \$6 trillion to \$30 trillion boon to philanthropy via bequests and planned gifts.

Professional advisors will need a fully stocked pantry of options to respond to this swell in estate planning. Advised funds are sure to be an important option for clients who are philanthropic. I look forward to your call.

## A Legacy for Maine: The Emily and William Muir Community Fund

Emily Lansingh Muir (1904-2003) was an artist, writer, activist and architect, and a treasured member of the Stonington-Deer Isle community. She began coming to Stonington as a child and moved there in 1939 with her husband, the sculptor William Muir. The Island Institute in Rockland published Emily Muir's autobiography, *The Time of My Life*, last year.

In a tribute to Muir published in the *Island Ad-Vantages* last March, editor R. Nathaniel W. Barrows wrote: "During the second half of the 20th century, Emily Muir had more effect and influence on this island than any

other individual. She thought globally and acted locally. Her enduring energy, drive, creativity, steadfast principles and vision left indelible imprints on the public, economic, environmental and personal life of our community."

Muir's dedication to building and sustaining community in Maine is carried on through the Emily and William Muir Community Fund established through a bequest to the Maine Community Foundation. The Muir Fund will promote the appropriate use of saltwater resources for Maine coastal communities in

the Penobscot Bay region and support other community-based efforts for education, health and community values.

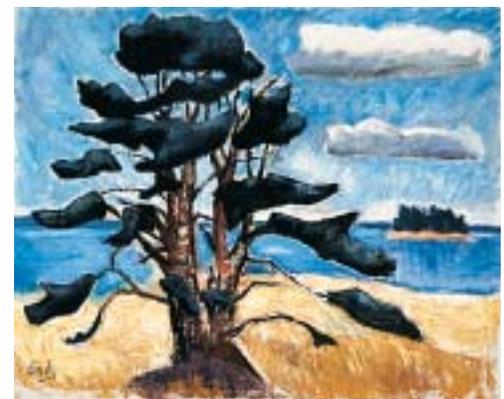


Photo: Ken Woisard

One of Emily Muir's bold oil paintings, *Seaside Spruce Tree*, is on display in the Ellsworth office of the Maine Community Foundation.

# Legacies for Maine

## Tom and Bonnie Sawyer: "To Give Back to Our Community"

Tom Sawyer's first official act as a Maine state senator was to offer a prayer to the legislature in the form of two quotes. The first, from an Enfield minister, referred to the connectedness of humanity in a world in which people are dependent upon others for their food, clothing and livelihood. The second, from the 19th-century Dutchman Stephen Grellett, offered a credo to follow in repaying that debt: "I expect to pass through this world but once, therefore any good that I can do, or any kindness that I can show any fellow creature, let me do it now; let me not defer it nor neglect it, for I shall not come this way again."

When asked why he and his wife, Bonnie, a retired Army nurse, have planned a bequest to the Maine Community Foundation's Legacies for Maine, Tom repeats that quote. Clearly, for this energetic entrepreneur-turned-statesman, it's a mantra.

*Die Broke* by Stephen M. Pollan and Mark Levine also inspires the Sawyers. "Die Broke makes the case," says Tom, "that the worst thing anyone can do is to leave their children a lot of money." Not that the book advocates shunning one's kids to luxuriate on round-the-world cruises. Rather, Tom explains, it advises people to "help their children while you're young enough to watch them enjoy it." With two daughters in their late twenties, the Sawyers are doing just that. "But the day we die," adds Tom, "they don't get anything. The Maine Community Foundation gets it all."

This makes sense to the Sawyer daughters because they are accustomed to their parents' philanthropy. The Sawyers have always given away about ten percent of what they earn—even more in good years. However, it wasn't until they decided to sell the family-owned Sawyer Environmental Recycling Company that they began to think seriously

"ability and eagerness to handle complex situations."

It wasn't long before Tom, himself, was on the MCF board, a way for him to study the foundation while continuing to serve his community. He found that even when he didn't agree with the board's decisions, he respected the way it prioritized donor interests. "I took great comfort in the

notion that when we were making decisions on our advised funds, if Donor X wanted money to focus on illiteracy in Washington County—which might not have been a top priority of MCF at the time—the foundation, within appropriate bounds, went out of its way to solicit requests from groups dealing with that. The Maine Community Foundation really looks after the desires of its donors."

With their Charitable Remainder Trust gift to the foundation's Legacies for Maine, adds Tom, "we can keep our history of community involvement after our deaths and decide where our money is going." They'll carry on their concern for the young through a scholarship fund allowing Maine youth to attend Maine colleges and

universities. It's what Tom calls, "priming the pump: kind of a triage notion. It's easier to get to people when they're young rather than fix problems when they're older."

While Bonnie may be quieter about her efforts, she shares Tom's passion for leaving the world a better place. "We have done well," she says. "Tom is very successful. Part of why we're on this earth is to participate, to make our place and time better than when we entered—to give back to our community." Through Legacies for Maine, they have.



Photo: Steve Katz

Tom and Bonnie Sawyer at their home in Bangor. The Sawyers believe they can leave a legacy for future generations of Mainers.

about estate planning. "No one knows how long they'll be alive," says Tom. "We are no Stephen and Tabitha King or Harold Alfond, but certainly we can leave a legacy for the generations that follow."

At first, they thought they'd set up a family foundation. After looking into it, however, the complexity of going it alone didn't seem to make a lot of sense. When they began investigating other options, the Sawyers became impressed with the Maine Community Foundation's Board of Directors and its

## *The Art of Young Waponakki*

*"I was thinking about Native Americans. I chose this picture because I liked the way the Indian looked. He seemed peaceful and important."*

*James Marsh*



"The Native American" by James Marsh, a sixth-grader at the Indian Island School, was one of 30 featured works in the 2003 Waponakki Student Art Show, "Beyond the Mountain: Modern Views of Traditional Ideas," displayed at the Abbe Museum in Bar Harbor. Art teachers Michael E. Vermette, Indian Island School; Romantha Burow, Beatrice Rafferty School, Pleasant Point; and Steve Braziller, Indian Township School, Peter Dana Point, organized the exhibition, which included works by students in early childhood and preschool grades through eighth grade.

The exhibition received support from MCF's Maine Expansion Arts Fund, the Maine Arts Commission and the Maine Humanities Council.

## *In the News*

### **"The Creative Economy Cuts Across Almost Every Sector..."**

From *The Bangor Daily News* editorial page, June 19, 2003

*T*here's a new buzz these days in economic development and policy circles centered on something called the "creative economy." Because it's a new term, creative economy often is misunderstood to mean innovation in science and technology or even, simply, creativity in the workplace, which is certainly nothing new. Instead, creative economy refers to a newly defined economic cluster that has always been a part of our overall economy, but has only recently been identified as a discrete economic sector.

The creative economy is unified by an underlying characteristic of artistic and cultural creativity. With individual artists at its core, the creative economy includes people who are employed in advertising, architecture, design, film, the literary and performing arts, music, publishing, television and radio, cultural heritage and arts museums,

and the like. The creative economy cuts across almost every sector and is comprised primarily of non-profit organizations, self-employed individuals, and small businesses, many of which serve larger businesses of all types.

...Until recently, ...even those employed in the creative economy did not identify themselves as part of the larger economic sector. The New England Council argues it's high time we consider what the force of coordinated policies and investment might ultimately yield in promoting economic growth and prosperity throughout New England. Maine has endorsed this notion whole heartedly and statewide organizations, such as the Maine Arts Commission, the Maine Community Foundation, and even Governor Baldacci, have begun promoting local efforts to strengthen creative economies.

*Kathryn Hunt*

Kathryn Hunt is a research associate at the Margaret Chase Smith Center for Public Policy at the University of Maine and a resident of Bangor. A statewide creative economy conference is being planned for May 2004.



Gillyin Gatto, *Farrier's Homestead Visit*, color woodcut, 1989. Gatto, a printmaker from Machias, is one of more than 225 artists, crafters, musicians, historical societies, museums and other cultural resources listed in the Washington County Cultural Directory. Production of the directory received support from the Maine Community Foundation, the Maine Arts Commission and many Washington County community members.

# Celebrating 20 Years

## One of Maine's Shining Stars

In a converted railroad station nestled just off the beaten track in Ellsworth, the Maine Community Foundation quietly goes about its business as a catalyst for philanthropy in Maine. Now celebrating its 20th year, the nonprofit public foundation has awarded more than 15,000 grants and scholarships totaling almost \$45 million in its two decades of service. Born, bred and flourishing in Hancock County, it is one of Maine's shining stars.

From its modest beginning, the foundation has grown to an agency with 19 employees that manages more than 600 funds with a value of more than \$100 million. Last year alone, grants and scholarships totaled \$8.6 million to more than 2,700 organizations and individuals, including 487 grants totaling \$822,697 right here in Hancock County.

The community foundation movement began in Cleveland

almost a century ago. There are now about 700 such foundations in the country. MCF is ranked among the top 10 percent and its president, Henry Schmelzer of Somesville, sees the foundation as being still in its early stages of growth.

Among the strengths of the foundation are its prudent investment strategies and effective stewardship of philanthropic assets. Even during the difficult market environment of the past three years, MCF's primary investment portfolio was among the top third of nonprofit portfolios monitored by Cambridge Associates, one of the nation's leading investment consultants. In a donor survey conducted last fall, the foundation received a superb 94 percent satisfaction rating.

The mission of the foundation is to work with charitably-minded citizens to strengthen Maine communities. With both

restricted and unrestricted funds at its disposal, the foundation is able to assist a wide variety of organizations and programs.

This year, MCF has joined with the Maine Development Foundation in a Compact for Higher Education. Recognizing that Maine lags behind the national and New England averages in the number of citizens with bachelors' degrees, the compact is an effort to develop ways to encourage more high school graduates and adults to continue their education.

The Maine Community Foundation and the donors with which it works are united in their commitment to Maine and its communities. We applaud the foundation for its work of the past 20 years, and wish it well as it moves ahead in the 21st century.

*This editorial appeared in the Ellsworth American, September 25, 2003.*

## A Trunk Show to Teach History

Students in downeast Washington County and those in schools in Aroostook County's St. John River Valley will have the opportunity to experience a special moment in history during the school year. The Washington County and Aroostook County Committees of the Maine Community Foundation made a \$3,500 grant to the St. Croix International Waterway Commission to purchase items for 12 trunks that provide a course of study based on the history of St. Croix Island. Next year marks the 400th anniversary of the settlement of the island, the

first made by the French in North America.

Each trunk contains 30 items, including a curriculum outline for teachers and a variety of teaching aids: maps, excerpts from Samuel de Champlain's diary, a beaver pelt, a birch bark dipping cup, spices, a wooden shoe with a leather upper and Passamaquoddy language cassettes. National Park Service staff at Acadia National Park, in consultation with a team of advisors and school teachers, produced the trunks.



Photo: Kathy Bockus, St. Croix Courier

Left to right: Janet B. Weston, a member of MCF's Washington County Committee; Lee Sochasky, executive director of the St. Croix International Waterway Commission; Bruce Jacobson, the National Park Service's site liaison officer for the St. Croix International Historic Site; and Marilyn Chase, an advisor with MCF's Aroostook County Committee, were on hand to present some of the items in the school resource kits that will be used by schools in Washington and Aroostook counties.

# *A Morning in the Sunkhaze Meadows*

**W**hile the beauty of the day of September 11, 2001, in Maine may have seemed incongruous to the horror of the events elsewhere, our walk to Oak Point helped me sense, in that unperturbed wild world of nature, an orderly harmonious whole working toward the support of all life everywhere. I am deeply grateful to have been in the company of my husband and our friends in a place so good and unspoiled as Sunkhaze that morning.

*I hope this special place will always be appreciated and protected. I think it is in wild places like Sunkhaze we are most likely to become aware of the interconnectedness of life and to recognize our human place within the whole. May such places also inspire us to work for the common good in support of life everywhere.*

Lynn Biebel,  
"Refuge on 9/11"



Photo courtesy U.S. Fish and Wildlife Service

This aerial view shows Sunkhaze Meadows, an area of peat deposits that ranges from Bangor northward to Lincoln. The name Sunkhaze is derived from the Abenaki phrase *Wetchi-sam-kassek*, which, roughly translated, means "concealing outlet," referring to the Sunkhaze Stream's well-disguised confluence with the Penobscot River. Sunkhaze Meadows National Wildlife Refuge was officially established on November 22, 1988.

From "Tales of Sunkhaze: An Oral History Project of the Friends of Sunkhaze Meadows National Wildlife Meadow." Publication of this booklet was supported by a grant from a donor-advised fund of the Maine Community Foundation. For more information, visit [www.sunkhaze.org](http://www.sunkhaze.org).

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MAINE COMMUNITY FOUNDATION  
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