

2010 Philanthropy Partners Conference



Changing Times
New Opportunities



Maine
Philanthropy
Center

May 6, 2010

Point Lookout, Northport, Maine

Keynote & Plenary Speakers



Diana Aviv is president and CEO of **Independent Sector**, the national leadership forum for America's nonprofits, foundations, and corporate giving programs. By representing tens of thousands of organizations across the country, Independent Sector advances the common good by leading, strengthening, and mobilizing the charitable community. Diana is a frequent speaker on trends in and key issues for the sector, such as the financial state of nonprofits, public policies affecting charities and foundations, the role of civil society in democracy, and civic engagement. She has testified several times before Congress and has been featured in media outlets such as *The New York Times*, *The Washington Post*, *The Wall Street Journal*, NPR, and MSNBC.com.



Susan Raymond is a regular international conference speaker on the future role of philanthropy in economic growth and civil society, having worked on philanthropy and economic development projects throughout the United States, Africa, the Middle East, and Eastern Europe, as well as in Russia and Asia. Currently, Susan is Executive Vice President for Research, Evaluation, and Strategic Planning for **Changing Our World**. She also serves as Chief Analyst for onPhilanthropy.com, a global resource for nonprofit professionals. Widely published, her most recent book *Finance for Hard Times: Nonprofit Revenue Strategies in Economic Crisis* was released in January. Other titles on philanthropy: *Mapping the New World of American Philanthropy: Causes and Consequences of the Transfer of Wealth* (2007) and *The Future of Philanthropy: Economics, Ethics, and Management* (2004).



Bradford Smith is president of the **Foundation Center**, a national nonprofit service organization recognized as the nation's leading authority on organized philanthropy. The Center maintains the most comprehensive database on U.S. grantmakers and their grants around the world. Before joining the Foundation Center in 2008, Brad was president of the Oak Foundation in Geneva, Switzerland (US Office located in Portland, ME), a major family foundation with programs and grant activities in 41 countries in North America, Europe, Africa, Latin America, and South Asia. Prior to joining the Oak Foundation, he developed and led the Ford Foundation's Peace and Social Justice Program, the foundation's largest program area.



Angus S. King, Jr. served two four-year terms as Maine's 71st governor. He took office in 1995 as the only independent governor in the country, and his 1998 reelection was one of the largest margins of victory in Maine's history. As governor he focused on economic development and job creation, education, mental health services, corrections, land conservation and environmental protection, and improvements in service delivery by state government. Governor King's administration accomplished a total rebuild of the state's mental health and corrections systems, major improvements in the state's service capability, the largest increase of lands in conservation in the state's history, and the nationally recognized program to provide laptop computers to every seventh and eighth grade student in the state. He is currently Of Counsel to Bernstein Shur in Portland, lectures at Bowdoin College, serves on the boards of several Maine-based and international corporations, and is a principal of the alternative energy company, **Independence Wind**.

Day at a Glance

8:00 Check-in | Continental Breakfast | Exhibitors Open

9:00 Welcoming Remarks

9:15 Keynote Address

Pulling Together Today for Greater Impact Tomorrow
Diana Aviv, President & CEO, Independent Sector

Break

10:45 Breakout Session A

Noon Networking Lunch | Exhibitors Open | Optional Sessions

Results from Maine Survey on Nonprofit Organizations and Charitable Giving
Jason Maurice and Curtis Mildner, Market Decisions 12:30-1:15 (Seal Harbor)
Meet the Funders! See page 6 for details. 12:30-1:15 (Ducktrap)

1:30 Plenary Session

The Future of Philanthropy: Building A Bigger Tent
Susan Raymond, Executive Vice President, Changing Our World
Bradford Smith, President, Foundation Center
Angus King, Former Governor of Maine and Principal, Independence Wind
Meredith Jones, President, Maine Community Foundation (moderator)

Break

3:00 Breakout Session B

4:30 Networking Reception | Exhibitors Open

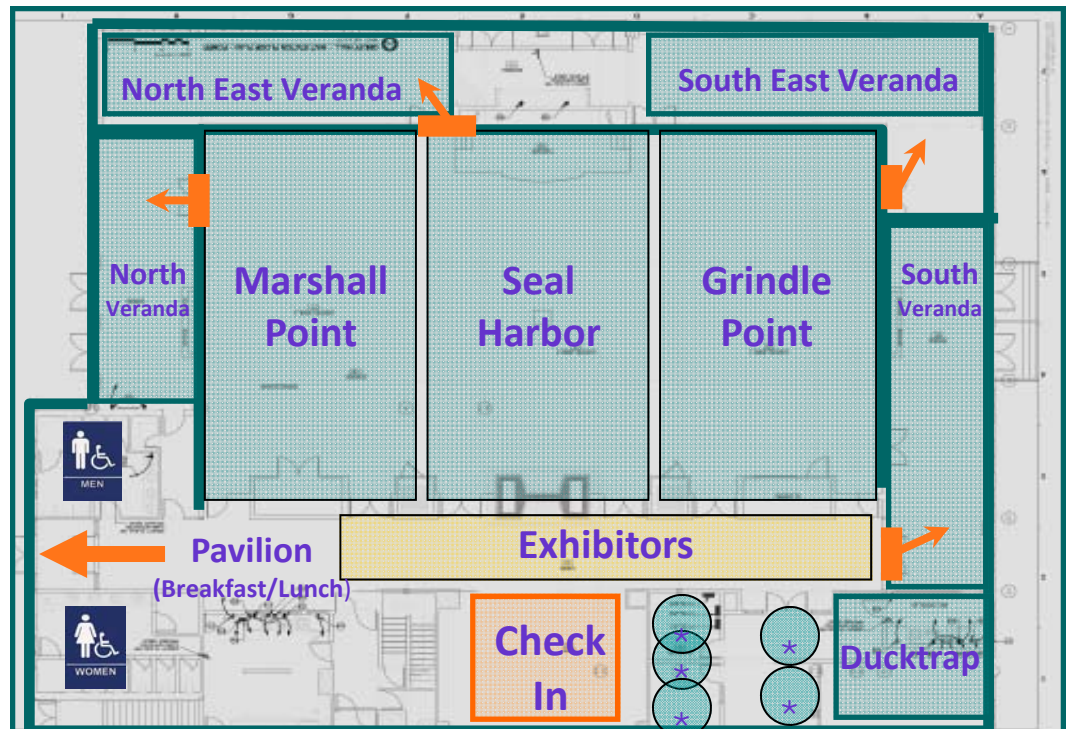
Connecting

during lunch...
visit our exhibitors,
meet the funders,
test-drive MPC's New
Online Directory,
and more!



Where's my breakout session?

Check your personal agenda on the **reverse of your nametag** for your A & B session assignments and room locations.



Breakout sessions (A)

It's 2010. Does Anybody Know Where My Grant Opportunities Are?

With the downturn in the value of funder investments, their need to meet existing grant commitments, and their desire to provide ongoing support for long-standing nonprofit partners, it may seem like the opportunity even to make the case to a funder for a new grant in Maine has diminished. A group of Maine funders that still accept open applications talk about what kinds of grant applications they are seeking. The session will feature some of the new voices of Maine foundations including new program officers and new foundations.

Keeping Arts and Culture at the Table: When There's Less of the Pie to Go Around

Arts and Culture organizations across the country are struggling to stay in the game while funding is directed to pressing needs driven by the challenging economy. These organizations are finding they often need to broaden their appeal to funders by enhancing their programming or expanding their reach to new audiences. This panel will present several different ideas of how such efforts can be successful. You will hear from grantmakers who will share why two specific projects were funded and the Maine Arts Commission will discuss their new Creative Communities = Economic Development grant initiative which encourages the cultural, economic and governmental sectors to work together to effect community revitalization.

Building Coalitions for Policy Change: Maine as Leader in Environmental Health Reform

The Alliance for Clean and Healthy Maine frames toxic pollution as a public health issue and draws strength from the environmental, labor, and public health movements. Learn how this coalition of 12 Maine-based organizations, together with committed funding partners, has embarked upon a multi-year public health campaign to phase out the long-lived toxic chemicals that build up in the food web and our bodies. Campaign victories include phasing out DECA, a dangerous flame retardant, and Maine's groundbreaking Kid-Safe Products Act. Because of this coalition's success, Maine is one of a few states leading the nation toward stronger and safer chemical policies.

Collaboration from the Ground Up: Community Caring Collaborative

Washington County's Community Caring Collaborative (CCC) provides a unique case-study of local agencies and individuals who came together to build a base of mutual support in their efforts to provide services in an under-served rural environment. The CCC's area of focus is parents and children affected by exposure to drugs, alcohol and other risk factors. Their approach - which includes input and involvement from front-line workers and family members - is particularly successful in part because of its grassroots structure and the time spent on developing trust as a basis for collaboration. Supported initially by a foundation that was willing to take a risk on a new model, the group recently received the first of six nationally-awarded five-year grants under the Substance Abuse & Mental Health Services Administrations Project LAUNCH (Linking Actions for Unmet Needs in Children's Health). Learn more about how a grassroots effort of this type can not only impact service delivery in a community, but also influence state policy and bring national focus and resources to Maine.

Session A: 10:45 a.m.

Seal Harbor

Craig Denekas, Libra Foundation
Travis Cummings, Harold Alford Foundation
Stephanie Eglinton, Sam L. Cohen Foundation
Andrew Tansey, The Betterment Fund
Lelia De Andrade, Maine Community Foundation
Michael Currie, Davis Foundations (Moderator)

Session A: 10:45 a.m.

Marshall Point

Gioia Perugini, Jane's Trust
Marcia Minter, Portland Ovations
Carol Geist, The Betterment Fund
Hugh French, Tides Institute
Donna McNeil, Maine Arts Commission
Scott RC Levy, Penobscot Theatre
Ken Spier, Maine Community Foundation & Portland Symphony (Moderator)

Session A: 10:45 a.m.

North East Veranda

Ruth Hennig, John Merck Fund
Michael Belliveau, Environmental Health Strategy Center
Sandra Cort, Learning Disabilities Assoc. of Maine
Lisa Miller, The Bingham Program
Bob Duchesne, State of Maine Legislature
Andrea Perry, Broad Reach Fund (Moderator)

Session A: 10:45 a.m.

South Veranda

Janet Taylor, C.F. Adams Charitable Trust
Marjorie Withers, Community Caring Collaborative
Elizabeth Neptune, Office of Minority Health, State of Maine
Becky Hayes Boober, Maine Health Access Foundation (Moderator)

Breakout sessions (A)

Funding Change through Public Policy: Opportunities and Challenges

Better public policies are often fundamental to achieving the shared missions of philanthropy and nonprofits. The legal experts have busted the myth that foundations can't support grantees that advocate, or even advocate themselves. So, how do foundations get comfortable with supporting policy change in practice? What issues arise for nonprofits seeking philanthropic support for their policy agendas? In this panel, foundation and nonprofit representatives discuss their experiences in approaching advocacy funding, including measuring results and innovations in evaluation; carving out a funding role in support of a long-term effort; determining roles and level of involvement (policy research, public education, grassroots mobilization, media, coalition-building, influencing policy makers); and supporting leaders and core support for advocacy organizations.

Adapting in the Face of Rapid Change: When Merger is the Best Option

Many nonprofits, public agencies and foundations are operating in the space between "what was" and "what will be" and answering tough questions about impact and sustainability. It's a time of transition, requiring leaders to pivot, plan, and adapt in the face of new realities. Revenue is down, demand is up, and the need for leadership and programs to address pressing issues facing Maine has never been greater. This session will present a case study spotlighting how Spurwink Services, a statewide educational and behavioral services organization, has launched an intentional effort to partner and merge with smaller, community based youth-serving organizations to provide economies of scale for operations, fundraising, and possible replication of successful programs. The Compass Project, a Portland-based boat building program and one of three organizations that recently merged with Spurwink, sought out this partnership after participating in a clinic offered by the Nonprofit Sector Viability Collaboration. Panelists will discuss how they made the decision to merge, how this has played out with organizational boards, staff, and partners, and how the change has impacted the clients of both organizations.

To Tweet or Not To Tweet? Using Social Media Effectively

Does your organization have a Facebook page? Are you blogging? Do you tweet? If so, are these social media channels working to help you meet mission, develop audience, raise funds? Or have you been hesitant to jump into the social media world altogether? This session will delve into the hows, whys, and why nots for those already using social media, those interested, and those who just aren't sure if it's right for their organization. Learn how other organizations are using social media channels and what's been working.

The Future of Philanthropy: Engaging the Next Generation

More than a decade of research confirms that youth engaged in philanthropy lead their peers in giving and volunteering throughout their lifetimes, and more often choose nonprofit and human services careers. New youth-focused efforts are teaching the responsibilities and rewards that come with being an involved and giving community member, and how to make informed contributions that complement service. Find out how school and college-based programs use formal approaches to invite youth participation, how collaborations can leverage resources and scale efforts statewide, and how family philanthropy traditions can evolve with generations.

Session A: 10:45 a.m.

Ducktrap

Elinor Goldberg, Maine Children's Alliance
Mike Laracy, Annie E. Casey Foundation
Mark Swann, Preble Street
Meg Greene, JTG Foundation
Garrett Boo Martin, Maine Center for Economic Policy (Moderator)

Session A: 10:45 a.m.

South East Veranda

John Shoos, United Way of Greater Portland
Dawn Stiles, Spurwink Services
Patricia Ryan, Compass Project
Bo Norris, Lennox Foundation (Moderator)

Session A: 10:45 a.m.

North Veranda

Laura Quinn, Idealware
Len Bartel, Maine Health Access Foundation

Session A: 10:45 a.m.

Grindle Point

Larry Sterrs, Unity Foundation
Dave Perron, Jobs for Maine's Graduates
Susie Dorn, Joseph McKeen Center for the Common Good at Bowdoin College
Bill Hopwood, An Environmental Trust
Catharine Hartnett, Communications and Public Affairs Consultant (Moderator)

"Meet the Funders" 12:30—1:15 p.m. Ducktrap

Several funders will be available for informal conversations with nonprofits at the end of the lunch period. These optional sessions are **geared toward individuals who may be new to their organizations or who have little or no prior experience working with foundations.**

Participants are encouraged to learn about general foundation mission and approach; however, *this is not a time to discuss specific projects or grant proposals.*

Participating foundations include: Betterment Fund, Bingham Program, Sam L. Cohen Foundation, Maine Bar Foundation, Maine Community Foundation, Maine Health Access Foundation, Maine Initiatives, and Elmina B. Sewall Foundation.

MPC seeks to create a community of shared inquiry characterized by mutual respect and trust. While networking is encouraged, we ask you to refrain from soliciting funds at MPC events.

Breakout Sessions (B)

Higher Education for a Stronger Maine Workforce: Long-term Strategies for Change

Maine has one of the top high school completion rates in the country; yet only 39% of working-age adults have college degrees. This session highlights the Harold Alfond College Challenge (HACC), a novel collaboration between a funder, a nonprofit organization, and a government entity that seeks to close the gap between high school and secondary degree attainment and strengthen Maine's economy by increasing access to higher education. Panelists will provide details on how the program started, discuss the organizational relationships, and share lessons learned.

Mission Investing and Social Enterprises: New Tools for Greater Impact

The shifting economic environment has heightened interest in using alternative methods for organizing and investing in social change. Foundations and individual donors are exploring the use of "mission investing" — a spectrum of activities that use financial investments to achieve philanthropic goals — as a way to compliment traditional grantmaking. At the same time, nonprofit organizations and new socially-conscious ventures are experimenting with new structures to generate financial resources beyond charitable giving. This session will highlight how Maine organizations are using new and innovative approaches to achieve important community economic development goals for the state.

Funder Collaboration: Is the Whole Greater Than the Sum of its Parts?

With so many pressing issues and so few dollars, funders find that working in collaboration with their colleagues can sometimes make it possible to achieve results on a bigger scale. But successful collaborations take patience, compromise and commitment. And how do these collaborations benefit grantees? This session will offer models of what works and share pitfalls to avoid. Panelists will describe various collaboration strategies - from information sharing and peer learning around a common interest to pooling funds for joint grantmaking. Hear viewpoints from grantmakers and grantees on how a couple of funder collaborations are working.

**Session B: 3:00 p.m.
South Veranda**

Henry Bourgeois, Maine Compact for Higher Education
Gra Hatala, Harold Alfond Foundation
Elizabeth Vanderweide, Finance Authority of Maine
Elizabeth Banwell, Maine Association of Nonprofits (Moderator)

**Session B: 3:00 p.m.
Grindle Point**

Bill Eldridge, MOO Milk
John Piotti, Maine Farmland Trust
Ellen Golden, Coastal Enterprises, Inc.
Peter Taylor, Maine Community Foundation (Moderator)

**Session B: 3:00 p.m.
Marshall Point**

Cynthia Gibson, Cynthesis Consulting
Jay Espy, Elmina B. Sewall Foundation and Environmental Funders Network
Heather Davis, Healthy Communities
Nancy Brain, Sam L. Cohen Foundation and Maine Oral Health Funders
Lisa Kavanaugh, Community Dental
Andrea Perry, Environmental Funders Network (Moderator)

Breakout Sessions (B)

It's 2010. Does Anybody Know Where My Grant Opportunities Are?

With the downturn in the value of funder investments, their need to meet existing grant commitments, and their desire to provide ongoing support for longstanding nonprofit partners, it may seem like the opportunity even to make the case to a funder for a new grant in Maine has diminished. A group of Maine funders that still accept open applications talk about what kinds of grant applications they are seeking. The session will feature some of the new voices of Maine foundations including new program officers and new foundations.

Collaboration Made Real: The Bayside Promenade Project

The Bayside Trail Project is creating a world-class greenway through the Bayside neighborhood of Portland, turning a former industrial area into a livable, walkable, vibrant urban amenity. Hear from the project partners as they discuss the collaboration and planning that went into taking this project from concept to reality. Panelists will discuss the unique decade-long collaboration among local residents, businesses, Portland Trails, the Trust for Public Land and the City of Portland. Project funders will discuss the unique combination of private, corporate and government leadership and funding that is bringing this project to successful fruition. Participants will take away perspectives and strategies for building and sustaining collaboration over time among various and disparate partners and how to respond to unique opportunities when they arise.

Engaging the Community Voice to Inform Projects, Programs, and Services

This session will focus on different ways Maine funders, non-profits, and government agencies engage communities as partners in the design and implementation of projects, programs, and services meant to benefit them. Panelists will share their strategies for meaningfully engaging communities and community members in their work. Participants will also be able to share examples from their own organizations and/or personal experiences. You will leave with many different examples of organizations and projects that have intentionally designed opportunities for community input and engagement, and how that has helped maximize project, program and/or service impact.

Linking People, Agencies & Missions When It's Not the Usual Suspects

Coalitions are hard enough to keep together when they involve closely-related groups. How about trying to convene a project that involves multiple government agencies; nonprofits from the child welfare, domestic violence prevention, animal welfare, public health, and education subsectors; state-wide as well as local groups; and active participation by funders? The Linkage Project is a uniquely Maine effort designed to highlight the links among various forms of family violence, its impact on both the human and non-human members of a family, and the importance that recognizing these links can have in creating more effective intervention and prevention programs. The project is also an example of how organizations and public agencies with seemingly disconnected interests can come together to impact social change and further all of their missions. Learn from the participants and the funders why and how they came together, how they've made it work, anticipated and unexpected outcomes of "coalescing," and lessons learned.

Session B: 3:00 p.m.

Seal Harbor

Jere Michelson, Libra Foundation
Gail Kezer, JTG Foundation
Stacy Begin, Davis Foundations
Megan Shore, Elmina B. Sewall Foundation
Philip Hall, Jessie B. Cox Trust
Betsy Biemann, Maine Technology Institute (Moderator)

Session B: 3:00 p.m.

North Veranda

Gioia Perugini, Jane's Trust
Nan Cumming, Portland Trails
Jim Gooch, Trust for Public Land's Maine Office
Alexander Jaegerman, City of Portland Planning Office
Karen Voci, Harvard Pilgrim Health Care Foundation (Moderator)

Session B: 3:00 p.m.

Ducktrap

Lelia DeAndrade, Maine Community Foundation
Lisa Sockabasin, MaineCF People of Color Fund & Maine Office of Minority Health,
Deborah Felder, Broad Reach Fund
Amanda Beal, Eat Local Foods Coalition
Kim Crichton, Maine Health Access Foundation (Moderator)
Edmund Cervone, Maine Development Foundation (Moderator)

Session B: 3:00 p.m.

Northeast Veranda

Rachel Pohl, Jane's Trust
Anne Jordan, Maine Commissioner of Public Safety
Linda Jariz, Youth Alternatives Ingraham
Kathleen Fobear, Animal Refuge League of Greater Portland
Kathy Savesky, A Kinder World Foundation (Moderator)

About the Panelists

Elizabeth Banwell oversees program development and strategic initiatives for The Maine Association of Nonprofits. Prior to MANP, Elizabeth ran her own consulting business, working with the leaders of nonprofits and foundations locally, nationally and internationally.

Len Bartel joined MeHAF in 2008 as a Program Officer after nearly 13 years as a development professional working for a variety of community-based organizations. Len manages MeHAF's Fund for the Future, its current cohort of oral health grantees, its emerging program-related investment work, and is leading MeHAF's effort to support nonprofit organizational assessment, development, and sustainability.

Amanda Beal is a graduate student and co-leader for Maine's Eat Local Foods Coalition's *By Land and By Sea: Connecting Maine's Farming and Fishing Communities*. Amanda is a participant in the Broad Reach Fund's Emerging Leaders program.

Stacy Begin is the Program Officer for the Davis Family Foundation and Davis Conservation Foundation. She has over 15 years of nonprofit management experience. She currently serves on the Advisory Council for MANP as well as the Program Committee for the Environmental Funders Network.

Betsy Biemann has served as president of the Maine Technology Institute (MTI) since 2005. MTI's purpose is to support entrepreneurs in the State's seven targeted technology sectors to bring innovations to market and create good jobs for people across Maine. It does this by making grants and loans to Maine companies to jointly fund technology development projects aimed at strengthening Maine's high-potential technology clusters. Betsy joined MTI from The Rockefeller Foundation.

Becky Hayes Boober, Ph.D. is a Program Officer for MeHAF, leading the initiative to integrate primary care and behavioral health services. She retired from state employment with over 20 years experience in leadership positions in Maine government, assisting with policy-level, systemic improvement initiatives.

Henry Bourgeois is the Executive Director of the Maine Compact for Higher Education. Created in 2003 by the Maine Development Foundation and MaineCF, the Compact aims to dramatically increase higher education attainment among Maine's working-age population. Formerly, Henry led the Maine Development Foundation and its innovative programs linking investments in education and workforce development with Maine's long-term economic growth.

Nancy Brain has been the Executive Director of the Sam L. Cohen Foundation since 2003, and a trustee and Co-Director of the Frances Hollis Brain Foundation since its founding in 1993.

Prior to that, she worked at UNUM as a system analyst and a systems liaison with the product development areas. Nancy serves on the boards of MPC, the National Center for Family Philanthropy and the Nine Wicket Foundation.

Edmund Cervone is a Program Director for the Maine Development Foundation, where he oversees and staffs the work of the Maine Economic Growth Council and the Policy Leader's Academy. He is a current member of MeHAF's CAC and served as Chair for three terms.

Sandra Cort is a board member and past president of the Learning Disabilities Association of Maine. Sandra also serves on the board of the Learning Disabilities Association of America.

Kim Crichton is a Program Officer at MeHAF where she oversees programs to strengthen Maine's safety net. She is also the staff liaison to the Community Advisory Committee which works with the Board to guide and improve MeHAF's work.

Nan Cumming is the Executive Director of Portland Trails, a private non-profit land trust with a mission to save open spaces and build a network of multi-use trails throughout greater Portland. Nan has worked as an active partner in the Bayside Trail project for the past ten years.

Travis Cummings is a Program Officer at the Harold Alfond Foundation, where he focuses primarily on grant due diligence. Prior to joining the Alfond Foundation, Travis was a Grant Officer at the Great Bay Foundation. Formerly, he worked in the Office of Senator Edward M. Kennedy and on the City of Boston's host committee for the 2004 Democratic National Convention.

Michael Currie joined H.M. Payson & Co. in 1997. Prior to that he was a partner in the law firm of Pierce Atwood. Michael currently serves on the Boards of the United Way of Greater Portland, United Way Foundation, Maine Cancer Foundation, University of Maine School of Law Foundation, Davis Family Foundation, Rosamond Thaxter Foundation, and Maine Philanthropy Center.

Lelia DeAndrade, Ph.D. is the Director of Grantmaking Services at MaineCF. She oversees all competitive grant programs including the People of Color Fund, the Equity Fund, the state-wide Community Building Program, and the Noyce Award for Non-profit Excellence. Prior to joining MaineCF, Lelia was the Associate Director of the Center for the Prevention of Hate Violence.

Craig N. Denekas is Vice President of the Libra Foundation. Since 2001, his focus has been on the acquisition and redevelopment of real estate, particularly Pineland, whose 5,000 acres of farm and forest land is now being reutilized as a business, education, agricultural and recrea-

tion center. Formerly, Craig was at the law firm of Perkins, Thompson, Hinckley & Keddy.

Susie Dorn is Director of the McKean Center for the Common Good at Bowdoin College that fosters collaboration between the College and communities to augment student learning and benefit the public good. She administers the Common Good Grant program that allocates \$10,000 to community organizations while engaging students in the philanthropic experience.

Bob Duchesne is a legislator in the Maine House of Representatives and is House Chair of the Natural Resources Committee. He chairs the Community Preservation Advisory Committee created by the Maine Legislature to address Smart Growth issues. Bob also serves on the Maine Audubon Board of Trustees.

Stephanie Eglinton joined the Sam L. Cohen Foundation as a program officer in 2007. She has a graduate degree in public policy and has served various nonprofits in Maine and Washington DC in the areas of government relations, planning, and development.

Bill Eldridge serves as general manager of Maine's Own Organic Milk (MOO Milk), an incorporated low-profit limited liability corporation (L3C) focused on processing and marketing high-quality organic milk throughout New England in order to support the long-term sustainability of dairy farms in the state.

Jay Espy is Executive Director of the Elmina B. Sewall Foundation, which continues Mrs. Sewall's legacy with a focus on conservation, animal welfare and social needs, primarily in Maine. For the prior two decades, he served as president of Maine Coast Heritage Trust.

Deborah Felder is Advisor to the Broad Reach Fund, a donor advised fund with a focus in sustainable food systems, economic development, and social justice.

Kathleen Fobear is an educator with over 15 years experience with children and adults of all ages. She has also worked in the animal welfare field and is currently the Humane Education Director at the Animal Refuge League of Greater Portland.

Hugh French is director of the Tides Institute & Museum of Art in Eastport. The institute combines a mixture of cultural resources and overlapping alliances with regional renewal.

Carol Berg Geist has served as a trustee of the Betterment Fund since 1997. She is an attorney and partner at Davidson, Dawson & Clark LLP, counseling not-for-profit entities and private business organizations in connection with their formation, governance and other affairs.

Cynthia Gibson has more than 25 years of experience in the nonprofit sector as a consult-

About the Panelists *continued*

ant, senior staff person, and advisor for national nonprofits and philanthropic institutions. As principal of Cynthesis Consulting, she provides a wide range of services—including strategic planning and positioning, program development, evaluation, marketing/communications, and public policy research and analysis—for nonprofits and foundations across the country.

Elinor Goldberg is the Executive VP of the Maine Children's Alliance and directs development, communications and federal advocacy for the organization. Ellie has over 35 years of experience in child advocacy, including direct services, policy development, communications, community organizing, and administration.

Ellen Golden is Managing Director of CEI Investment Notes, Inc. (CINI) an affiliate of Coastal Enterprises, Inc., a nonprofit community development financial institution. Ellen is responsible for raising capital from accredited individuals and family foundations to finance small and medium sized businesses, affordable housing projects and community facilities.

Jim Gooch is the Program Director for the Maine CommunityScape Initiative at the Trust for Public Land, working to create regional coalitions of communities around shared land use priorities. He has been with TPL for three years.

Meg Greene is the Managing Director of the JTG Foundation, a private foundation established by the late Tom Gorman. JTG has three focus areas intended to improve the lives of Maine residents who: are disadvantaged; are living with mental illness; and/or are suffering from cancer. Meg is also a lawyer with Brann & Isaacson in Lewiston.

Philip Hall is a partner at GMA Foundations, a Boston staffing and consulting firm for donors. In addition to administering the Jessie B. Cox Trust, he is a program officer for the Theodore Edson Parker Foundation and for the Foley Hoag Foundation.

Catharine Hartnett is an independent communications consultant providing strategic communications services and tactical implementation support.

Gra Hatala is the Grants Administrator of the Harold Alfond Foundation, as well as the William and Joan Alfond Foundation and the Peter Alfond Foundation. Gra has an extensive background working at nonprofit agencies, including expertise in grant writing, strategic planning and providing leadership support.

Bill Hopwood has been co-trustee for the J.M.Hopwood Charitable Trust since 1979 and founded An Environmental Trust, Inc. in 1989 to pursue his own interests outside of the family philanthropy. Bill was President of Springhouse Energy Systems, Inc. which provided siting services to the wind industry and provided photo-

voltaic systems and components for commercial applications.

Alex Jaegerman has directed the Portland Planning Office for over 25 years, during which time Portland has become nationally recognized for its architectural heritage, quality of life, and dynamic small urban character.

Linda Jariz served several years as Project Coordinator for The Linkage Project, and currently works as an independent consultant. Linda's background includes 25 years in management positions in the public sector, including work in mental retardation services, youth in transition, trauma services, housing for people with disabilities, vocational rehabilitation, and cross-disciplinary projects.

Anne H. Jordan was appointed Commissioner of Public Safety for the State of Maine in March 2007 by Governor Baldacci. A former partner at Portland-based Norman Hanson DeTroy, LLC, Anne also previously served as an Assistant D.A. and Deputy D.A. with the York County District Attorney's Office.

Lisa C. Kavanaugh is the CEO of Community Dental, which provides accessible and affordable dental health services to children and adults in dental health centers in Biddeford, Portland, Lewiston, Rumford, and Farmington.

Gail V. Kezer is a Program Manager at the JTG Foundation. Previously, Gail worked as a litigation associate, an instructor in paralegal programs, contributing editor of Maine Lawyer's Review, and as the assistant to the president of Bowdoin College. Her volunteer service includes the Immigrant Legal Advocacy Project as well as Brunswick schools and the Brunswick School Board.

Michael C. Laracy is Director of Policy Reform and Advocacy at the Annie E. Casey Foundation, where he fosters and supports the Foundation's efforts to inform, guide, and influence public policy at the federal and state levels. He is also responsible for the Foundation's KIDS COUNT network and State Fiscal Analysis Initiatives and grant-making portfolios in poverty reduction and in budget and fiscal issues.

Donna McNeil is Director of the Maine Arts Commission where she oversees the cultural well being of the State of Maine through support for artists and arts organizations. She sits on the board of the New England Foundation for the Arts, Maine Film Commission, and the Governors Quality of Place Council.

Garrett Martin became Associate Director of MECEP in February 2009. Previously, he was the Director of Program Strategy at MaineCF and a former Associate Director at the Genesis Community Loan Fund. At MECEP, Garrett focuses on health policy and sustainable development.

Jere G. Michelson is VP and CFO of Libra Foundation in Portland, with oversight responsibility for all financial aspects of the Foundation's interests, as well as creamery and produce operations at Pineland. Prior to joining Libra Foundation, Jere was with the accounting firm of Baker Newman Noyes, LLC.

Lisa Miller is the Senior Program Officer of the Bingham Program, a charitable endowment based in Boston. Lisa is also a legislator in the Maine House of Representatives, serving on the Appropriations Committee, bringing to the budget process her expertise on health issues.

Marcia Minter is VP Creative Director of L.L.Bean where she defines and drives the brand identity and creative strategy for the company. Marcia is also an active community volunteer, serving on boards for Portland Ovations, Trust for Public Land, Center for The Cultural Exchange Foundation, and Maine Freedom Trails Project.

Elizabeth Neptune has over 20 years of experience in delivering innovative health and human services to Native Communities. In 2000 she received the Public Citizen Award from the National Association of Social Workers for her work in creating a culturally-based system of care for the children and families of Indian Township.

Bo Norris is founder of the Environmental Funders Network and co-founder of Maine Network Partners. Through the Lennox Foundation Bo has supported and is actively involved in a number of organizations. Currently Bo sits on the boards of the Maine Chapter of The Nature Conservancy, Common Good Ventures, Maine Wilderness Guides Organization, and Maine Philanthropy Center.

Dave Perron is Senior Director, New Business Development, Jobs for Maine's Graduates (JMG) Dave has been with JMG for 13 years and travels the country to consult in the areas of program development, management development, and funding development.

Gioia Perugini is the Associate Director of Select Client Services at Hemenway & Barnes, LLP. She works with individuals, families, advisors, charitable trusts and foundations to provide a range of philanthropic advisory and client services. Gioia oversees the environmental and arts and culture grant making for Jane's Trust.

John Piotti is executive director of Maine Farmland Trust, a statewide non-profit organization that has helped over 110 Maine farms remain viable and helped protect over 20,000 acres of Maine's best farmland. John also serves in Maine's citizen Legislature, where he is current House Majority Leader.

Rachel Pohl works with individuals, families, advisors, and charitable trusts in a variety of

About the Panelists *continued*

fields and geographies to provide strategic planning and program design, research philanthropic opportunities, review proposals, and negotiate grants. Rachel represents Jane's Trust, a regional philanthropy focusing on northern New England, Massachusetts and Florida.

Patricia Ryan is founder/director of the Compass Project, a community based organization of Spurwink. Pat is a licensed clinical social worker and a U.S. Coast Guard licensed captain.

Kathleen Savesky is Philanthropic Advisor to A Kinder World Foundation in NYC and Principal in Savesky & Company, Consulting. She has more than 35 years in nonprofit and educational settings, and currently specializes in nonprofit governance and strategic philanthropy, working with both foundation clients and a variety of nonprofit organizations.

John Shoos is Senior Vice President for Community Impact, and a 20 year professional with United Way of Greater Portland, responsible for planning and allocations, public policy and community initiatives.

Megan Shore is a Program Officer at the Elmina B. Sewall Foundation where she oversees the Foundation's grant making program. Megan most recently served as the Land Trust Program Manager for Maine Coast Heritage Trust.

Lisa Sockabasin is the Director of the Office of Minority Health at the Maine Center for Disease Control and Prevention which promotes health equity in Maine through the identification and elimination of health disparities. She is Chair of MaineCF's People of Color Fund Advisors.

Ken Spirer is a Board member and former Chair of MaineCF, as well as a Trustee of the Portland Symphony, Maine Audubon and the Harold Alfond Scholarship Program. Before retiring, he was a securities lawyer with 35 years experience as a federal regulator in Washington and in house

counsel in the financial services industry in New York.

Larry Sterrs is Chairman and CEO of the Unity Foundation, a public charity that provides management consulting, and strategic, capacity building grantmaking to non-profit organizations in Maine. Mr. Sterrs has been with the Unity Foundation since it was founded by Bert & Coral Clifford in 2000.

Dawn Stiles is President of Spurwink Services, Maine's largest mental health agency providing education, treatment, professional development and diagnostic evaluations in Central and Southern Maine. Dawn served as Deputy Director of Maine's Child Welfare program prior to coming to Spurwink in 2000.

Mark Swann has been Executive Director of Preble Street since 1991 and has overseen significant growth and expansion of the agency and its mission in that time: from a small soup kitchen with two employees to a multi-site, comprehensive social service agency for homeless and low-income individuals and families that includes the Resource Center, Lighthouse Shelter, Teen Center, Logan Place, Florence House, and Maine Hunger Initiative, with 150+ employees and hundreds of volunteers.

Andrew Tansey has been one of six individual trustees for the Betterment Fund since 2003, serving in conjunction with US Trust/Bank of America. The Betterment Fund was established by the will of William Bingham, 2nd, a resident of Bethel, Maine, with a substantial record as a philanthropist. Andrew is an attorney concentrating in the area of trusts and estates in NYC.

Janet Taylor serves as Philanthropic Advisor for the law firm of Ropes & Gray in Boston as well as Managing Trustee of the C. F. Adams Charitable Trust. Her background includes more than 35 years of experience working with private foundations, corporate giving programs and family phi-

lanthropy, including 14 years with Raytheon Company where she was responsible for corporate-wide community relations and contributions.

Peter Taylor is VP for Program Development and Grantmaking Services at MaineCF. He is responsible for directing the foundation's programmatic work, which includes grantmaking, initiatives, County and Regional Program, and it's first significant program-related investment—a \$1 million low interest loan to Maine Farmland Trust to help permanently protect farmland.

Elizabeth Vanderweide is the statewide program manager of the Harold Alfond College Challenge Grant Program. She has had a diverse career in program management and marketing from consumer and industrial goods to services to healthcare and education.

Karen Voci is Executive Director of Harvard Pilgrim Health Care Foundation where she has overseen the expansion of the Foundation's work into New Hampshire and Maine, the reengagement of Harvard Pilgrim's employees in community service and giving, as well as the design and launch of a regional initiative to prevent childhood obesity.

Marjorie Withers, LCPC is the director of the Community Caring Collaborative (CCC) which includes 37 partners in Maine. The Collaborative is dedicated to creating a seamless system of care for infants and young children using best practice methodologies.



Optional Session 12:30-1:15 pm (Seal Harbor)

Results from Maine Survey on Nonprofit Organizations and Charitable Giving

Jason Maurice and Curtis Mildner | Market Decisions

Portland-based Market Decisions surveyed 401 randomly selected adults in February to learn more about Mainer's awareness and attitudes toward nonprofits, how they're volunteering their time, contributing money and what motivates them to give. Market Decisions President Curt Mildner and Research Analyst Jason Maurice will present their analysis of Maine donor profiles at the 2010 Philanthropy Partners Conference. The research is a joint project of the Maine Philanthropy Center and Maine Association of Nonprofits.

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Karen Schaller, Fundraising Database Specialist

As a fundraising database consultant, Karen works with small to medium-sized nonprofits and targets inefficiencies in their database management and donor cultivation. Karen Schaller can help your organization: improve management and utilization of your donor and prospect data; cultivate and maintain relationships; focus and optimize your fundraising efforts; increase your accountability. Services include data evaluation, database conversions, and database training.

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William Stockwell has served over 283 clients in 39 years of service to New England Non-Profits, helping organizations improve their development potential through highly personalized, traditional development techniques along with cutting edge technology to raise over \$43 Million through Annual Funds, Major Gifts, Capital Campaigns, Endowments, and Planned Giving. He has also helped hundreds of organizations computerize their development offices and is a Dealer for SUSTAIN Fundraising Management.

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