

Foundation Giving in Maine 2020

A snapshot of giving from the Maine Philanthropy Center

Based on latest available FY2018 data



Maine Philanthropy Center

Maine Foundations	Maine Assets	Maine Charitable Giving
375+	\$3.3 Billion	\$211 Million
Active private and community foundations	0.3% of total U.S. foundation assets, which surpassed \$1 trillion for the first time in 2018	U.S. and abroad

Foundation Giving in Context

Individuals

\$533 million | 62%

Individuals account for the vast majority of charitable giving, roughly two-thirds of the state total.

Corporations

\$43 million | 5% (Estimate)

Non-foundation corporate giving is difficult to track, but annual estimates at the national level tend to be 5% of total charitable giving.



Foundations

\$211 million | 24%

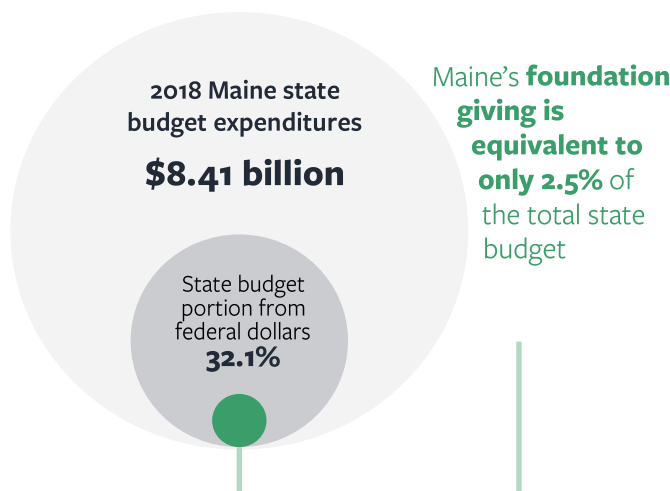
Foundation giving makes up roughly a quarter of total charitable giving in Maine.

Bequests

\$78 million | 9% (Estimate)

Charitable giving through decedent estates, or bequests, composes a significant portion of Maine's giving, but varies widely each year. Data is not available for 2018, so we used a national estimate of 9%.

Philanthropy cannot replace government spending, at either the state or federal level



What is a Foundation?

A foundation is a non-governmental nonprofit, 501 (c)3, organization that supports charitable activities. Most give grants, but private operating foundations may directly fund their own charitable activities.

Private foundation assets typically come from a family, individual, or corporation. Each year, a private non-operating foundation is required to give at least 5% of its assets to charitable activities.

Public charities and certain foundations are not included in the data on this page but are included in the analysis on the following pages. See *Maine Funders* on page 2 for more information.

Sources: Candid, 2020; IRS 990s and Statistics of Income; *State Expenditure Report*, Fiscal 2017-2019, National Association of State Budget Officers

*Individual giving data from 2017. Corporate giving and bequest percentages based on national estimates by Giving USA.

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The Most Active Maine Funders

A Closer Look at the Top 25 Maine Funders

A small percentage of the hundreds of Maine grantmakers are responsible for the majority of funding distributed throughout the state. We compile this **list and brief analysis of the top 25 Maine funders, measured by annual giving to Maine**, to provide a closer look at the giving of the most active organizations in Maine's philanthropic community each year.

ASSETS	TOTAL MAINE GIVING
\$2.44 Billion	\$134 Million

74%

OF \$179 MILLION TOTAL GIVING EVERYWHERE STAYS IN MAINE

Giving by Sector

39%	Education
23%	Human Services
14%	Health
9%	Public, Societal Benefit
9%	Environment & Animals
6%	Arts, Culture, & Humanities

Other sectors account for < 1%

Rank	Name	Maine Giving (in millions)	Maine % of Total Giving
1	Harold Alfond Foundation	39.78	97.1%
2	Maine Community Foundation	27.18	77.5%
3	Libra Foundation	10.38	100%
4	Elmina B. Sewall Foundation	8.02	98.4%
5	Lunder Foundation	7.93	53.6%
6	John T. Gorman Foundation	7.24	100%
7	Stephen & Tabitha King Foundation	4.02	87.7%
8	Maine Health Access Foundation	3.59	100%
9	Davis Family Foundation	3.10	96.7%
10	The Bill and Joan Alfond Foundation	2.81	65.3%
11	Doree Taylor Charitable Foundation	2.39	99.9%
12	Maine Cancer Foundation	1.97	100%
13	The Betterment Fund	1.79	99.7%
14	Maine Justice Foundation	1.68	99.5%
15	MELMAC Education Foundation	1.66	100%
16	Sam L. Cohen Foundation	1.63	98.9%
17	Next Generation Foundation	1.27	70.8%
18	The Nine Wicket Foundation	1.09	100%
19	Gloria C. Mackenzie Foundation	1.00	100%
20	Quimby Family Foundation	0.93	100%
21	TD Charitable Foundation	0.93	3.5%
22	Morton-Kelly Charitable Trust	0.89	100%
23	Maine Credit Unions Campaign for Ending Hunger	0.79	100%
24	Francis T. and Louise T. Nichols Foundation	0.76	40.7%
25	Roxanne Quimby Foundation	0.74	89.4%

Maine Funders

A *Maine Funder* in this report is an organization incorporated or registered with the state of Maine or subject to the jurisdiction of a Maine municipality. Included are private and community foundations, as well as grantmaking public charities.

Notable exclusions:

- Certain operating foundations and other entities whose charitable giving is exclusive to one or more supported organizations or affiliates
- Public charities largely supported by government funds
- Public charities whose grantmaking is a minority of their charitable expenses

United Ways of Maine are evaluated separately on the last page.








Maine's top 25 funders gave nearly \$134 million to over 1,450 recipients in 2018.

98% of those funds went directly to recipients in Maine, while 2% went to organizations out of state for direct impacts in Maine. Maine recipients with undisclosed locations account for over \$3 million of the total Maine giving, and are not included in the table below.

Sixteen-County Funders

80% of Maine's most active funders gave to recipients in six or more counties in 2018, with five of them making grants in all 16 Maine counties:

- ◆ Maine Community Foundation
- ◆ Elmina B. Sewall Foundation
- ◆ Stephen & Tabitha King Foundation
- ◆ Davis Family Foundation
- ◆ MELMAC Education Foundation

County	2016 Population (Projected Trend)	Total Funding	# Recipients — Median Total Received	Top Sector—(% of funding)
Androscoggin	107,269 ▲	\$4.89M	66 — \$20,850	Human Services—46%
Aroostook	68,116 ▼	\$1.94M	73 — \$10,000	Health—32%
Cumberland	290,905 ▲	\$39.99M	364 — \$22,650	Human Services—29%
Franklin	30,071 ●	\$1.43M	40 — \$14,558	Human Services—31%
Hancock	54,398 ▲	\$6.10M	122 — \$20,000	Human Services—26%
Kennebec	121,328 ▼	\$34.96M 	152 — \$18,314	Education—56%
Knox	39,655 ▼	\$2.43M	76 — \$15,000	Human Services—39%
Lincoln	33,993 ▼	\$3.75M 	50 — \$16,680	Env. & Animals—68%
Oxford	57,096 ▼	\$1.43M	66 — \$10,000	Education—32%
Penobscot	151,515 ▲	\$12.66M 	142 — \$15,000	Education—59%
Piscataquis	16,876 ▼	\$2.79M 	30 — \$20,000	Education—78%
Sagadahoc	35,133 ●	\$0.98M 	34 — \$10,000	Env. & Animals—52%
Somerset	50,663 ▼	\$3.39M 	32 — \$10,000	Education—85%
Waldo	39,425 ▲	\$4.98M 	41 — \$12,576	Human Services—77%
Washington	31,566 ▼	\$3.26M	69 — \$17,450	Education—34%
York	202,223 ▲	\$1.73M	75 — \$12,500	Human Services—30%

This data reflects the location of the recipient and does not reveal the full picture of the areas ultimately impacted by this funding.

Three counties—Cumberland, Kennebec, and Penobscot— received 68% of the funding. While much of this money directly impacts the large, relatively dense local populations, these counties are also home to many of the state's larger nonprofits that serve large regions or the entire state, so that a portion of their funding passes through to benefit other counties. A typical recipient in Cumberland county received over \$22K in total from these funders in 2018. In contrast, giving in Kennebec and Penobscot counties is more characterized by large grants to a few organizations and a much lower median total funding per recipient.

 The whale indicates counties where the majority of funding goes to three or fewer recipients.

Other Organizations Giving in Maine

Out-of-State Organizations

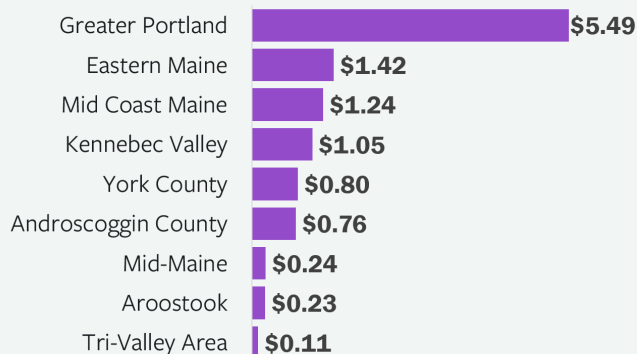
Many funders that support organizations and individuals in Maine are based in other states. For some, this support represents a majority of their total charitable giving.

Name	Maine Giving <i>in millions</i>	Maine % of Total Giving
Fidelity Charitable, MA	\$24.73	0.5%
Shelby Cullom Davis Charitable Fund, DE	\$16.37	15.3%
Richard King Mellon Foundation, PA	\$10.00	9.8%
Schwab Charitable, CA	\$5.87	0.3%
The Robert Wood Johnson Foundation, NJ	\$5.06	1.2%
Silicon Valley Community Foundation, CA	\$3.92	0.2%
Woodcock Foundation, NY	\$3.80	49.5%
Bonney Family Foundation, Inc., MA	\$3.75	100%
The Robert P. and Arlene R. Kogod Family Foundation, VA	\$2.77	24.6%
Broad Reach Foundation, MA	\$2.50	29.4%

United Way

As a coalition of independent public charities, United Way represents a unique segment of the philanthropic community in Maine. Taken together, Maine's United Ways make a significant contribution to statewide charitable giving, totaling over \$11 million.

United Way Giving in Maine (in millions)



Donor Advised Funds

Donor advised funds, or DAFs, have several characteristics that make them an attractive way to give charitably, a fact that has fueled their growth in recent years. This giving vehicle first appeared in the 1930s and has been widely utilized by community foundations ever since, but their popularity is currently growing rapidly.

DAFs are held and managed by sponsoring organizations, but the donor retains advisory privileges for issuing grants. A donor may create a fund with a local sponsor such as a community foundation or with a variety of other sponsor types.

As shown in the table above, national sponsors Fidelity Charitable and Schwab Charitable account for over \$30 million in grants to Maine. While this giving is reported as coming from outside the state, a significant portion of these funds are likely originating from donors who reside in Maine.

Sources: IRS 990s, funder-provided grant data



Maine
Philanthropy
Center

Each year, foundations, public charities, and other philanthropic entities provide millions of dollars of support to nonprofit organizations and individuals to strengthen the lives of Maine residents and their communities.

As part of our commitment to advancing the effectiveness of philanthropy in Maine, the Maine Philanthropy Center is proud to develop this annual snapshot of giving in Maine.

For more information, visit us at mainephilanthropy.org or call 207-780-5039.