

Extended to November 16, 2020

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0047

Form 990-PF

Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
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2019

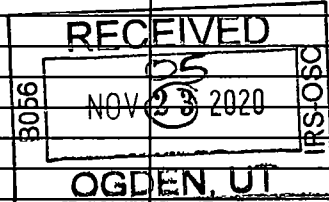
Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation John T. Gorman Foundation		A Employer identification number 01-0498551
Number and street (or P O box number if mail is not delivered to street address) One Canal Plaza	Room/suite 800	B Telephone number (207) 518-6784
City or town, state or province, country, and ZIP or foreign postal code Portland, ME 04101		C If exemption application is pending, check here ☐ 6
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation 64 ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 199,740,812.	J Accounting method. ☐ Cash ☒ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		0.		N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		707,385.	707,385.		Statement 2
4 Dividends and interest from securities		1,281,976.	1,281,976.		Statement 3
5a Gross rents					
b Net rental income or (loss) 8A					
6a Net gain or (loss) from sale of assets not on line 10		-1,986,997.			Statement 1
b Gross sales price for all assets on line 6a 38,123,139.					
7 Capital gain net income (from Part IV, line 2)			529,953.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		0.	-343,080.		
12 Total. Add lines 1 through 11		2,364.	2,176,234.		
13 Compensation of officers, directors, trustees, etc		437,690.	39,572.		398,118.
14 Other employee salaries and wages		921,829.	84,031.		837,798.
15 Pension plans, employee benefits		134,361.	8,778.		125,583.
16a Legal fees Stmt 4		14,530.	0.		14,530.
b Accounting fees Stmt 5		28,766.	1,724.		27,042.
c Other professional fees Stmt 6		1,191,269.	738,838.		452,431.
17 Interest					
18 Taxes Stmt 7		356,213.	7,802.		70,948.
19 Depreciation and depletion		76,433.	0.		
20 Occupancy		164,574.	8,644.		155,930.
21 Travel, conferences, and meetings		125,044.	5,843.		119,201.
22 Printing and publications					
23 Other expenses Stmt 8		99,866.	393.		207,658.
24 Total operating and administrative expenses. Add lines 13 through 23		3,550,575.	895,625.		2,409,239.
25 Contributions, gifts, grants paid		6,613,493.			6,613,493.
26 Total expenses and disbursements. Add lines 24 and 25		10,164,068.	895,625.		9,022,732.
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements		-10,161,704.			
b Net investment income (if negative, enter -0-)			1,280,609.		
c Adjusted net income (if negative, enter -0-)				N/A	



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end of year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	246,996.	510,661.	510,661.
	2 Savings and temporary cash investments	3,217,666.	6,245,750.	6,245,750.
	3 Accounts receivable ▶ 2,127,386.			
	Less: allowance for doubtful accounts ▶		2,127,386.	2,127,386.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ 500,000.			
	Less: allowance for doubtful accounts ▶ 0.	0.	500,000.	500,000.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	393,232.	516,549.	516,549.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock Stmt 10	45,095,397.	45,599,908.	45,599,908.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other Stmt 11		131,204,538.	143,633,961.	143,633,961.
14 Land, buildings, and equipment; basis ▶ 1,041,475.				
Less: accumulated depreciation Stmt 12 ▶ 434,878.		175,037.	606,597.	606,597.
15 Other assets (describe ▶ Statement 13)		1,471,492.	0.	0.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		181,804,358.	199,740,812.	199,740,812.
17 Accounts payable and accrued expenses		485,755.	460,891.	
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ Statement 14)	1,425,497.	384,240.	
	23 Total liabilities (add lines 17 through 22)	1,911,252.	845,131.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions	179,893,106.	198,895,681.	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances	179,893,106.	198,895,681.	
30 Total liabilities and net assets/fund balances	181,804,358.	199,740,812.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	179,893,106.
2 Enter amount from Part I, line 27a	2	-10,161,704.
3 Other increases not included in line 2 (itemize) ▶ Unrealized Gain on Investments	3	29,164,279.
4 Add lines 1, 2, and 3	4	198,895,681.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	198,895,681.

Form 990-PF (2019)

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly Traded Securities				
b From pass through				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a 35,606,189.		37,593,186.	-1,986,997.	
b 2,516,950.			2,516,950.	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			-1,986,997.	
b			2,516,950.	
c				
d				
e				
2 Capital gain net income or (net capital loss)		If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 2 529,953.		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).		If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 3 N/A		

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	9,003,170.	194,653,767.	.046252
2017	8,804,217.	189,285,893.	.046513
2016	8,825,330.	176,148,226.	.050102
2015	8,921,571.	190,380,868.	.046862
2014	8,434,219.	198,441,424.	.042502
2 Total of line 1, column (d)			2 .232231
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 .046446
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 187,814,054.
5 Multiply line 4 by line 3			5 8,723,212.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 12,806.
7 Add lines 5 and 6			7 8,736,018.
8 Enter qualifying distributions from Part XII, line 4			8 9,522,732.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

Part IV Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2019 estimated tax payments and 2018 overpayment credited to 2019

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be: Credited to 2020 estimated tax

6a	97,469.
6b	0.
6c	0.
6d	0.
7	97,469.
8	0.
9	
10	84,663.
11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions ME		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Form 990-PF (2019)

Part VII-A: Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address www.jtgfoundation.org	X	
14 The books are in care of Michael Bevilacqua Telephone no. (207) 518-6784 Located at One Canal Plaza, No. 800, Portland, ME ZIP+4 04101		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

Part VII-B: Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		X

Form 990-PF (2019)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

N/A

Organizations relying on a current notice regarding disaster assistance, check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

☐ Yes ☒ No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 15		412,879.	24,811.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Nicole Witherbee - One Canal Plaza, Suite 800, Portland, ME 04101	Chief Program Officer 40.00	216,089.	15,845.	0.
Michael Bevilacqua - One Canal Plaza, Suite 800, Portland, ME 04101	CFO 40.00	215,513.	15,842.	0.
Jennifer Beck - One Canal Plaza, Suite 800, Portland, ME 04101	Senior Program Associate 40.00	115,528.	13,673.	0.
Lauralee Raymond - One Canal Plaza, Suite 800, Portland, ME 04101	Program Associate 40.00	72,398.	22,620.	0.
Erin Clark - One Canal Plaza, Suite 800, Portland, ME 04101	Grants Associate 40.00	61,044.	21,846.	0.

Total number of other employees paid over \$50,000

0

Form 990-PF (2019)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Cambridge Associates 125 High Street, Boston, MA 02110	Investment Advisory Services	474,505.
Organizational Consulting & Leadership Group 815 Gist Avenue, Silver Springs, MD 20910	Fellowship Plan./ Implement. Support	135,136.
Northern Trust Company 50 South LaSalle Street, Chicago, IL 60603	Investment Custody Services	111,083.
Christopher Shea 1720 Monkton Farms Drive, Monkton, MD 21111	Comm. Development Consulting	79,684.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 See Statement 16	500,000.
2	
3 All other program-related investments. See instructions.	
Total. Add lines 1 through 3	500,000.

Form 990-PF (2019)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	190,295,338.
b	Average of monthly cash balances	1b	378,829.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	190,674,167.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	190,674,167.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,860,113.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	187,814,054.
6	Minimum investment return. Enter 5% of line 5	6	9,390,703.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	9,390,703.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	12,806.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	12,806.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	9,377,897.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	9,377,897.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	9,377,897.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	9,022,732.
b	Program-related investments - total from Part IX-B	1b	500,000.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	9,522,732.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	12,806.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	9,509,926.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Form 990-PF (2019)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				9,377,897.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			8,891,187.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 9,522,732.				
a Applied to 2018, but not more than line 2a			8,891,187.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				631,545.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018 Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				8,746,352.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

Part XV. Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
See Statement 24	N/A	See Attached	Various	6,613,493.
Total			3a	6,613,493.
b Approved for future payment				
None				
Total			3b	0.

Form 990-PF (2019)

Form 990-PF Gain or (Loss) from Sale of Assets Statement 1

(a) Description of Property	Manner Acquired		Date Acquired	Date Sold
Publicly Traded Securities				
(b) Gross Sales Price	(c) Cost or Other Basis	(d) Expense of Sale	(e) Deprec.	(f) Gain or Loss
35,606,189.	37,593,186.	0.	0.	-1,986,997.

(a) Description of Property			Manner Acquired	Date Acquired	Date Sold
From pass through					
(b) Gross Sales Price	(c) Cost or Other Basis	(d) Expense of Sale	(e) Deprec.	(f) Gain or Loss	
2,516,950.	2,516,950.	0.	0.	0.	

Capital Gains Dividends from Part IV 0.

Total to Form 990-PF, Part I, line 6a -1,986,997.

Form 990-PF Interest on Savings and Temporary Cash Investments Statement 2

Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest Income	707,385.	707,385.	
Total to Part I, line 3	707,385.	707,385.	

Form 990-PF Dividends and Interest from Securities Statement 3

Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Dividend Income	1,281,976.	0.	1,281,976.	1,281,976.	
To Part I, line 4	1,281,976.	0.	1,281,976.	1,281,976.	

Form 990-PF Legal Fees Statement 4

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal Fees	14,530.	0.		14,530.
To Form 990-PF, Pg 1, ln 16a	14,530.	0.		14,530.

Form 990-PF Accounting Fees Statement 5

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting & Tax Preparation Fees	28,766.	1,724.		27,042.
To Form 990-PF, Pg 1, ln 16b	28,766.	1,724.		27,042.

Form 990-PF Other Professional Fees Statement 6

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment Management Fees Program	738,838.	738,838.		0.
Consulting/Management Fees	452,431.	0.		452,431.
To Form 990-PF, Pg 1, ln 16c	1,191,269.	738,838.		452,431.

Form 990-PF	Taxes	Statement	7
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Payroll Taxes	77,560.	6,612.		70,948.
Foreign Taxes	1,190.	1,190.		0.
Excise Tax Expense (Refundable)	277,463.	0.		0.
To Form 990-PF, Pg 1, ln 18	356,213.	7,802.		70,948.

Form 990-PF	Other Expenses	Statement	8
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Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Office Expense	89,845.	393.		89,452.
Insurance	10,021.	0.		10,021.
Accrual to Cash Adjustment	0.	0.		108,185.
To Form 990-PF, Pg 1, ln 23	99,866.	393.		207,658.

Footnotes	Statement	9
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Form 990-PF	Corporate Stock	Statement 10
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Description	Book Value	Fair Market Value
Corporate Stock - Statement 23	45,599,908.	45,599,908.
Total to Form 990-PF, Part II, line 10b	45,599,908.	45,599,908.

Form 990-PF	Other Investments	Statement 11
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Description	Valuation Method	Book Value	Fair Market Value
Other Investments - Statement 23	FMV	143,633,961.	143,633,961.
Total to Form 990-PF, Part II, line 13		143,633,961.	143,633,961.

Form 990-PF	Depreciation of Assets Not Held for Investment	Statement 12
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Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Furniture & Fixtures	239,654.	133,174.	106,480.
Computers & Equipment	63,523.	53,111.	10,412.
Leasehold Improvements	738,298.	248,593.	489,705.
Total To Fm 990-PF, Part II, ln 14	1,041,475.	434,878.	606,597.

Form 990-PF	Other Assets	Statement 13
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Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Pending Investment Trade Sales/Purchases	1,471,492.	0.	0.
To Form 990-PF, Part II, line 15	1,471,492.	0.	0.

Form 990-PF	Other Liabilities	Statement 14
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Description	BOY Amount	EOY Amount
Deferred Tax Liability	116,781.	384,240.
Due to Broker	1,308,716.	0.
Total to Form 990-PF, Part II, line 22	1,425,497.	384,240.

Form 990-PF	Part VIII - List of Officers, Directors Trustees and Foundation Managers	Statement 15
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Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Expense Contrib Account
Anne Dinsmore One Canal Plaza, Suite 800 Portland, ME 04101	Director 1.00	0.	0. 0.
Maggie Christie Keohan One Canal Plaza, Suite 800 Portland, ME 04101	Director 2.00	0.	0. 0.
Richard W. Petersen One Canal Plaza, Suite 800 Portland, ME 04101	Director 1.50	0.	0. 0.
Shawn O. Gorman One Canal Plaza, Suite 800 Portland, ME 04101	Chairman & Director 2.00	0.	0. 0.
Anthony Cipollone (ex officio) One Canal Plaza, Suite 800 Portland, ME 04101	President, CEO, & Director 40.00	412,879.	24,811. 0.
Jeffrey J. Gorman One Canal Plaza, Suite 800 Portland, ME 04101	Vice Chairman & Director 1.00	0.	0. 0.
Martha E. Greene One Canal Plaza, Suite 800 Portland, ME 04101	Secretary & Director 2.00	0.	0. 0.
Weston Bonney One Canal Plaza, Suite 800 Portland, ME 04101	Treasurer & Director 2.00	0.	0. 0.
Totals included on 990-PF, Page 6, Part VIII		412,879.	24,811. 0.

Form 990-PF	Summary of Program-Related Investments	Statement 16
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Description

In addition to making grants, the Foundation may advance its mission through program-related investments (PRI). In April 2019, the Foundation advanced \$500,000 to The Genesis Fund as a PRI in the form of a loan bearing below-market interest. The loan agreement provides Genesis will use these funds to leverage capital for the acquisition of properties in the HUD Choice Neighborhood Census Tracts in Lewiston, Maine. The PRI agreement matures in 2029. As of December 31, 2019, there have been no repayments on the PRI.

Amount

To Form 990-PF, Part IX-B, line 1

500,000.

	Account A	Account B	Account C	Account D	Account E	Account F	Account G	Account H	Account I
Cash	3,004,850	78,148	41,478	-	-	-	-	-	-
Investment Cash	-	1,506,364	542,875	-	-	-	-	89,085	982,951
Common Stock	-	-	-	-	-	-	-	-	4,530,286
Equities	-	41,069,622	-	-	-	-	-	-	-
Fixed Income	-	-	-	5,455,151	-	-	-	16,668,194	-
Partnerships	-	23,393,680	3,576,147	-	-	30,127,632	-	-	-
Hedge Funds	-	48,526,790	15,755,202	-	49,369	-	-	-	-
Cash due from Broker	-	-	-	-	-	-	-	-	-
Accrued Income	4,308	(21,564)	2,022	-	241	4,836	-	86,062	5,890
Per Statements	3,009,158	114,553,039	19,917,725	5,455,151	49,610	30,132,468	-	16,843,340	5,519,127
Per 990-PF	3,009,158	114,553,039	19,917,725	5,455,151	49,610	30,132,468	-	16,843,340	5,519,127

	FMV
Total Investments - Cash	\$ 6,245,750
Total Investments - Corporate Stock	\$ 45,599,908
Total Investments - Other Investments	\$ 143,633,961
	\$ 195,479,619

EIN: 01-0498551

John T. Gorman Foundation

Statement 24

Part XV, Line 3a: Grants and Contributions Paid During the Year
Fiscal Year Ending December 31, 2019

Recipients' Name and Address	Relationship (if individual)	Foundation Status	Purpose of Grant or Contribution	Amount
AdCare Educational Institute of Maine, Inc 6 E Chestnut St Ste 101 Augusta, ME 04330-5765	n/a	PC	To sponsor the 2019 Opioid Summit	\$10,000
Adoptive and Foster Families of Maine, Inc 304 Hancock Street Suite 2A Bangor, ME 04401-6573	n/a	PC	To support economically disadvantaged kinship families through emergency financial assistance specific to food, heating and utilities assistance, and the provision of beds or cribs.	\$7,500
American Civil Liberties Union of Maine Foundation 121 Middle St Portland, ME 04101-7123	n/a	PC	\$500 to provide sponsorship support for the 2019 Annual Justice Louis Scolnik Award Dinner and \$30,000 to provide support for the provision of technical assistance to collaborating organizations seeking juvenile justice reform	\$30,500
Amistad PO Box 992 Portland, ME 04104-0992	n/a	PC	To provide general operating support.	\$15,000
Androscoggin Head Start and Child Care DBA Promise Early Education Center 269 Bates St. Lewiston, ME 04240-7331	n/a	PC	To support the roll-out campaign for the Growing our Tree Streets Transformation plan, utilizing a grassroots organizing effort augmented with traditional print and media promotion.	\$50,000
Area Interfaith Outreach PO Box 113 Rockland, ME 04841-0113	n/a	PC	To provide general operating support	\$15,000
Augusta Food Bank 161 Mount Vernon Ave Augusta, ME 04330-4230	n/a	PC	To support a backpack program, which provides nutritious food to food insecure children in the Augusta School System and at the Children's Center of Augusta	\$20,000
Avesta Housing Development Corporation 307 Cumberland Avenue Portland, ME 04101	n/a	PC	To support people who are transitioning from homelessness to affordable housing through an expansion of services in southern Maine	\$25,000
Axiom Education and Training Center 3 Water St Machias, ME 04654-1017	n/a	PC	\$175,000 to establish a statewide digital literacy training program to improve employment outcomes and serve as a national model, \$26,000 to support the general operations of the Washington County Adult Education program, and \$50,000 to support the work of Family Futures Downeast, a Two-Generation educational program for parents and their children in Washington County	\$251,000
Bangor Area Homeless Shelter 263 Main St Bangor, ME 04401-6403	n/a	PC	To provide general operating support	\$15,000

John T. Gorman Foundation

Bangor Housing Development Corporation 161 Davis Rd Bangor, ME 04401-2310	n/a	PC	\$200,000 to support the replication of an enhanced Family Self Sufficiency program at Brewer and Old Town Housing Authorities, \$267,000 to support the work of Families Forward, a two-generation approach supporting parents and their children simultaneously, \$1,000 to sponsor backpacks and school supplies for children attending their Summer Block Party, and \$20,000 to support the Comfortably Home program, which increases housing stability of low-income, elderly homeowners	\$488,000
Bates College 216 Lane Hall 2 Andrews Rd Lewiston, ME 04240-0000	n/a	PC	To provide scholarship support for ME students.	\$15,000
Beacon Project 131 Main Road Islesboro, ME 04848	n/a	PC	To fund transportation costs for low-income island residents to medical and other critical appointments on the mainland	\$10,000
Bluehub Capital 10 Malcolm X Boulevard Ground Floor Boston, MA 02119-1775	n/a	PC	To support the Working Communities Challenge, which will strengthen Maine communities' local leadership capacity by advancing local cross-sector collaboration via multi-year grant awards	\$100,000
Catholic Charities Maine PO Box 10660 Portland, ME 04104-6060	n/a	PC	To provide sponsorship support for World Refugee Day celebrations in Portland and Lewiston.	\$500
Center For Children's Law And Policy 1701 K St Nw Ste 1100 Washington, DC 20006-1510	n/a	PC	To support work affiliated with their assessment of the Maine juvenile justice system, to include data collection and analysis, document review, report printing, and youth/community focus groups.	\$42,520
Central Maine Community Health Corporation PO Box 4500 Lewiston, ME 04243-4500	n/a	PC	To conduct an evaluation of downtown Lewiston resident awareness of lead poisoning and prevention strategies prior to and after a comprehensive community education campaign on lead	\$20,000
Chebeague Island Council PO Box 12 Chebeague Is, ME 04017-0012	n/a	PC	To support the Samaritan Fund, which provides residents of Chebeague Island with essential services	\$7,500
Cheverus High School 267 Ocean Ave Portland, ME 04103-5707	n/a	PC	To provide general operating support	\$5,000
City of Bangor Public Health & Community Services Department 103 Texas Ave ME 04401	n/a	GOV	To provide support for a Homeless Outreach Caseworker who will assist chronically homeless adults in securing and maintaining stable housing	\$25,000
Community Concepts 240 Bates St Lewiston, ME 04240-7330	n/a	PC	\$75,000 to support the Lewiston Workforce Initiative, which connects individuals who have employment barriers to a career path, and \$150,000 to support work aligned with the HUD CHOICE grant	\$225,000
Conservation Law Foundation 62 Summer St Boston, MA 02110-1008	n/a	PC	To sponsor two screenings of a documentary about lead poisoning, one in Lewiston and one in Portland	\$5,000

John T. Gorman Foundation

Cooperative Development Institute PO Box 1051 Northampton, MA 01061-1051	n/a	PC	To provide business owners in Washington County with succession planning assistance, to provide workers with new skills that will improve profitability, and to sustain economic activity and access to goods and services in rural communities	\$100,000
Council for a Strong America 1212 New York Ave Nw Ste 300 Washington, DC 20005-3988	n/a	PC	To support their work co-leading the Right From The Start Coalition	\$50,000
Eastern Maine Development Corporation 40 Harlow Street Bangor, ME 04401-5182	n/a	PC	To provide grantwriting support for the State of Maine's application for National Health Emergency Grant funding	\$8,000
Educate Maine 482 Congress St Ste 303 Portland, ME 04101-3437	n/a	PC	\$50,000 to support the development and distribution of the 2019 Education Indicators for Maine report and two related policy briefs, \$80,000 to support the MaineSpark Coalition, and \$2,500 to support general operations	\$132,500
Foundation for a Strong Maine Economy 125 Community Drive Augusta, ME 04330-8156	n/a	PC	To align FocusMaine's sector-specific efforts with broader job training and workforce development efforts in the state and to support organizational efforts to research and implement best practice models and policies	\$50,000
Foundation for Maine's Community Colleges 54 Lighthouse Cir S Portland, ME 04106-1661	n/a	PC	\$2,500 to contribute to a scholarship fund created in memory of Sterling Kozlowski and \$10,000 to support The Leon A. Gorman Scholarship, which provides scholarships to students at Maine's community colleges who demonstrate strong academic achievement, financial need and a commitment to community service	\$12,500
Frannie Peabody Center 30 Danforth St Ste 311 Portland, ME 04101-4574	n/a	PC	To provide general operating support	\$15,000
Friends of Aroostook 317 Ludlow Road Houlton, ME 04730	n/a	PC	To provide general operating support	\$10,000
Friends of the Long Creek Youth Development Center 675 Westbrook St S Portland, ME 04106-1930	n/a	PC	To provide general operating support	\$25,000
Furniture Friends 15 Saunders Way, #500D Westbrook, ME 04098	n/a	PC	To provide general operating support.	\$10,000
Genesis Community Loan Fund 22 Lincoln St Brunswick, ME 04011	n/a	PC	To provide support for capacity building activities to strengthen existing infrastructure and increase delivery of services	\$25,000
Good Shepherd Food Bank 3121 Hotel Rd Auburn, ME 04210-8398	n/a	PC	To support innovative data- and community-driven strategies to improve access to nutritious food for all food-insecure Mainers	\$150,000

John T. Gorman Foundation

Goodwill Industries of Northern New England 34 Hutcherson Drive Gorham, ME 04038-2743	n/a	PC	\$107,000 to support the YouthBuild Take 2 program, which provides career pathways and opportunities to build community connections for disconnected youth in Lewiston-Auburn and \$55,000 to support to the Gateway to Opportunity program, which connects low-income youth, mostly public school students in Portland, with paid learning opportunities	\$162,000
Green and Healthy Homes Initiative - Coalition to End Childhood Lead Poisoning 2714 Hudson St Baltimore, MD 21224-4716	n/a	PC	\$7,500 to provide technical assistance to the City of Lewiston for a federal Lead Hazard Reduction grant application and \$50,000 to provide general operating support	\$57,500
Gulf of Maine Research Institute 350 Commercial St Portland, ME 04101-4618	n/a	PC	To provide general operating support	\$10,000
H O M E Inc PO Box 10 Orland, ME 04472-0010	n/a	PC	To provide general operating support	\$15,000
Hand in Hand, Mano en Mano 2 Maple Street Milbridge, ME 04658	n/a	PC	To provide immigrants and migrant workers with high-quality supports and referrals to meet their basic needs	\$15,000
Healthy Acadia 140 State St Ellsworth, ME 04605-1832	n/a	PC	To support the Downeast Gleaning Initiative, which harvests surplus food that would otherwise go to waste and redistributes it to food pantries and other food security organizations across Hancock and Washington counties	\$20,000
Healthy Community Coalition 105 Mt Blue Circle Farmington, ME 04938-6239	n/a	PC	To provide support for free mobile healthcare services offered to low-income, underserved residents living in Franklin County.	\$25,000
Healthy Homeworks 17 Kellogg St Portland, ME 04101-4303	n/a	PC	To support the development of a Property Health Report, which will aggregate community data to form a complete story of the health of hundreds of Lewiston properties and rentals, presenting them in a user-friendly format available to the public	\$10,000
Homeless Services of Aroostook Inc. PO Box 1753 Presque Isle, ME 04769-1753	n/a	PC	To support the Sister Mary O'Donnell Emergency Shelter	\$5,000
Immigrant Legal Advocacy Project 489 Congress Street 3rd Floor Portland, ME 04101	n/a	PC	\$25,000 to provide support for new staff to assist asylees coming into Portland and \$16,000 to provide general operating support	\$41,000
Island Commons Resource Center 132 Littlefield Rd Chebeague Is, ME 04017-3316	n/a	PC	To provide general operating support via their Sustainability Fund campaign.	\$15,000
Jobs for Maine's Graduates 65 Stone St Augusta, ME 04330-6115	n/a	PC	To support the Expanded Opportunity Passport program -- a financial capacity building, education, and matched savings program expanded to non-foster care youth who face challenges or have little or no family support	\$150,000

John T. Gorman Foundation

Kennebec Valley Mental Health Center 67 Eustis Pkwy Waterville, ME 04901-5173	n/a	PC	To support the Homes and Community-Based Treatment Program, which provides intensive, in-home, team-based therapy for children and their families who are experiencing difficulties beyond the scope of regular outpatient counseling	\$25,000
Knox County Homeless Coalition PO Box 1696 Rockland, ME 04841-1696	n/a	PC	To provide support for general operations to serve homeless clients in Knox, Lincoln and parts of Waldo County.	\$15,000
Kennebec Valley Community College Foundation 92 Western Ave Fairfield, ME 04937-1367	n/a	PC	To support a dedicated Two-Generation Student Navigator, who will connect economically disadvantaged KVCC student parents to wraparound supports to ensure degree completion	\$95,000
Lake Region Senior Service PO Box 816 Bridgton, ME 04009-0816	n/a	PC	To support a volunteer-based transportation service providing rides to medical appointments for individuals without other transportation options	\$10,000
Legal Services for the Elderly 5 Wabon St Augusta, ME 04330-7040	n/a	PC	To provide funds for the Elder Abuse Prevention and Response Program	\$50,000
Lewiston Auburn Metropolitan Chamber Of Commerce Foundation PO Box 59 Lewiston, ME 04243-0059	n/a	PC	To support the operations of Healthy Neighborhoods	\$50,000
Lewiston Public Schools 36 Oak St Lewiston, ME 04240	n/a	GOV	\$100,000 to fund a coordinator position at Lewiston High School to implement a culturally-competent restorative practices system school-wide, \$15,000 to send a team of Lewiston-area community members and school personnel to a training on generational poverty at the Harlem Children's Zone, and \$51,500 to attract and retain more diversity among instructional staff	\$166,500
Lewiston-Auburn Area Housing Development Corporation 1 College St Lewiston, ME 04240-7175	n/a	PC	To support an enhanced Family Self Sufficiency program in Lewiston.	\$80,000
Mabel Wadsworth Women's Health Center 700 Mt Hope Ave Ste 420 Bangor, ME 4401	n/a	PC	To provide mental health counseling to low income Mainers residing in northern and eastern Maine.	\$15,000
Maine Association For The Education Of Young Children 295 Water St Ste 10 Augusta, ME 04330-4659	n/a	PC	To support Maine AEYC's work co-leading the Right From The Start Coalition	\$20,000
Maine Association of Area Agencies on Aging PO Box 5415 Augusta, ME 04332-5415	n/a	SOI	To support five Meals On Wheels programs and the EZ Fix home repair program	\$150,000

John T. Gorman Foundation

Maine Association of Nonprofits 565 Congress St Ste 301 Portland, ME 04101-8300	n/a	PC	To provide operating support for the professional development, advocacy, and management resource needs of Maine's nonprofit organizations	\$10,000
Maine Cancer Foundation 170 Us Route 1 Ste 250 Falmouth, ME 04105-2152	n/a	PC	To support the John T. Gorman Cancer Fund, which funds organizations and programs that are working to reduce cancer incidence and mortality in Maine and/or to support cancer patients	\$150,000
Maine CASA 1 COURT STREET AUGUSTA, ME 04330	n/a	GOV	To support training and outreach activities related to the Maine Court Appointed Special Advocates program -- which recruits, screens, trains and oversees community volunteers to serve as officers of the court to act in pursuit of the best interests of children involved in child protection cases	\$7,500
Maine Children's Alliance 331 State St Augusta, ME 04330-7100	n/a	PC	To support the development of the Elevate Maine proposal, which seeks to support high quality early care and education services for low-income children in Maine, and to provide education about the project to key policy and decision makers and members of the early childhood field	\$2,500
Maine Community Action Association PO Box 200 East Wilton, ME 04234-0200	n/a	PC	\$80,000 to support Maine seniors' ability to age-in-place through home repairs, weatherization services, and home modifications based on mobility issues, and \$120,000 to support six transportation programs serving Maine seniors in under-served areas	\$200,000
Maine Council on Aging 8 Falcon Rd Lewiston, ME 04240-5815	n/a	PC	To provide sponsorship support for their 6th annual Summit on Aging	\$750
Maine Equal Justice Partners 126 Sewall St Augusta, ME 04330-6822	n/a	PC	To support the Invest in Tomorrow initiative, a diverse group of stakeholders working to develop and publish policy recommendations with the goal of increasing economic opportunities for Maine families in poverty	\$190,000
Maine Huts and Trails 496 Main St Apt C Kingfield, ME 04947-4152	n/a	PC	To provide general operating support	\$10,000
Maine Initiatives 56 North Street Portland, ME 04101-2756	n/a	PC	\$1,000 to provide sponsorship support for a funder learning tour with Maine's immigrant and refugee organizations, \$5,000 to provide sponsorship support for Maine Initiatives' Changemakers event, a day-long event showcasing the work of the Grants for Change Racial Justice Cohorts, and \$15,000 to support the Solidarity Fund, which will distribute funds to key Maine-based immigrant-led nonprofits doing crucial work with recently arrived asylees.	\$21,000
Maine Inside Out 56 North Street, Suite 101 Portland, ME 04101	n/a	PC	\$4,000 to bring a performance of Maine Inside Out's play "EXPOSED" to the Statewide Juvenile Justice Task Force, and \$65,000 to support the work of their Leadership Council, which develops the leadership and social capital of formerly incarcerated young people, and to support organizational efforts for financial management assistance	\$69,000
Maine Philanthropy Center PO Box 9301 Portland, ME 04104-9301	n/a	PC	\$13,500 to support general operations and to sponsor the 2019 Spring Symposium, and \$2,500 to support the Opportunity Fund	\$16,000

John T. Gorman Foundation

Maine Public Broadcasting Corporation 1450 Lisbon St Lewiston, ME 04240-3514	n/a	PC	To sponsor a new in-depth series on Maine Public that reports on Maine's childcare challenges	\$4,950
Maine Seacoast Mission 127 West St Bar Harbor, ME 04609-1430	n/a	PC	To support their their "Edge Journey" program, which provides fifteen 7th grade students each year with wraparound supports in-and-out of school – including leadership opportunities, community involvement, and travel opportunities	\$5,000
Maine State Housing Authority	n/a	GOV	To provide capacity support for MaineHousing's efforts to apply for a federal Lead Hazard Reduction grant	\$10,000
MaineGeneral Medical Center 35 Medical Center Pkwy Augusta, ME 04330-8160	n/a	PC	To support the provision of home-based parent coaching services through the modified Attachment and Biobehavioral Catch-up model to at-risk mothers in the Kennebec Valley Region	\$130,000
MapleStone 2435 Milton Mills Road Acton, ME 04001	n/a	PC	To support the provision of mental health counseling and supports for students who have experienced trauma / Adverse Childhood Experiences	\$13,000
MCH, Inc 46 Summer St Rockland, ME 04841-2920	n/a	PC	To provide nutritious meals and support services to low-income seniors and disabled adults in Knox County	\$15,000
Mercy Hospital 144 State St Portland, ME 04101-3776	n/a	PC	To support the One Mercy Campaign.	\$20,000
Mid Coast Hunger Prevention Program 12 Tenney Way Brunswick, ME 04011-2884	n/a	PC	To support general operating costs associated with programs offered to low-income food-insecure Mainers in the midcoast area.	\$15,000
Milestone Foundation 65 India St Portland, ME 04101-4209	n/a	PC	To provide support for the Milestone Homeless Outreach and Mobile Engagement Team, which provides mobile health care, outreach, crisis intervention, and referral services for homeless adults in Portland	\$15,000
Millinocket Memorial Library 5 Maine Ave Millinocket, ME 04462-1416	n/a	PC	To provide general operating support	\$5,000
Morrison Center 60 Chamberlain Rd Scarborough, ME 04074-9192	n/a	PC	To provide general operating support.	\$10,000
MSAD 54 61 Academy Circle Skowhegan, ME 04976	n/a	GOV	To support the Somerset Youth Collaborative, which works to provide alternate paths to graduation for Skowhegan area youth and improves school culture to be trauma-informed, so students feel valued and prepared to succeed	\$60,000
Muskie Fund for Legal Services PO Box 547 Portland, ME 04112-0547	n/a	PC	To provide sponsorship support for the Muskie Fund for Legal Services' annual dinner, which raises money for four legal aid organizations in Maine	\$1,700

John T. Gorman Foundation

Muskie School of Public Service of Southern Maine 5703 Alumni Hall Ste 101 Orono, ME 04469-5703	University	n/a	PC	\$68,500 to pilot and support a Young People's Caucus, which brings together vulnerable Maine youth aged 14 - 26 with policy makers who are determining public policies that directly impact their lives, and \$50,000 as match funding to implement Children Need Amazing Parents, a national model focused on achieving permanency and lifelong connections for older youth in foster care	\$118,500
NAMI Maine 52 Water Street Hallowell, ME 04347-1467		n/a	PC	To provide general operating support.	\$2,500
New Beginnings 134 College St Lewiston, ME 04240-6810		n/a	PC	To provide sponsorship for New Beginnings' Annual Celebration Dinner	\$1,000
Next Step Domestic Violence Project 733 Bangor Road Ellsworth, ME 04605		n/a	PC	To remove barriers to housing stability experienced by victims of abuse and their children through rent subsidies, one-time investments in immediate needs, and specialized housing advocacy	\$20,000
Northern Light Inland Hospital Eastern Maine Healthcare Systems 200 Kennedy Memorial Drive Waterville, ME 04901		n/a	PC	To support on-site food, food security resources, and transportation vouchers for primary care patients at Northern Light Inland Hospital who are screened and identified as in need of additional supports	\$25,000
Olympia Snowe Women's Leadership Institute 1 Canal Plz Ste 501 Portland, ME 04101-4083		n/a	PC	\$15,000 to support the delivery of the Olympia Snowe Women's Leadership Institute's "My Values," "My Voice," and "My Vision" program at Lewiston High School, and \$10,000 in general operating support	\$25,000
Oxford County Mental Health Services 150 Congress St Rumford, ME 04276-2035		n/a	PC	To engage Oxford County schools in becoming trauma-informed and integrate resiliency building into school culture	\$100,000
Penobscot Community Health Care 103 Maine Ave Bangor, ME 04401-4330		n/a	PC	To support the expansion of Penobscot Community Health Care's pediatric practice into a larger and more efficient facility	\$25,000
Pine Tree Legal Assistance 88 Federal St Portland, ME 04101-4205		n/a	PC	To support the existing medical-legal lead hazard partnership in Lewiston and to replicate the project in the Portland area	\$265,000
Portland Housing Service Corporation 14 Baxter Blvd Portland, ME 04101-1802		n/a	PC	To support continued funding to enhance and expand PHA's Family Self Sufficiency Program	\$25,000
Portland Public Library 5 Monument Sq Portland, ME 04101-4017		n/a	PC	\$25,000 to support the library's Social Worker in Residence, who works to connect vulnerable low-income patrons to social services and basic need supports, and \$7,500 to support the library's child and family programming	\$32,500
Portland Public Schools 353 Cumberland Avenue Portland, ME 04101		n/a	GOV	\$100,000 to provide support for the Portland Public Schools' Equity Specialist position, and \$25,000 to support the planning process for Riverton Elementary to become a Community School.	\$125,000
Preble Street 38 Preble Street 3rd Floor Portland, ME 04101-2049		n/a	PC	\$10,000 to support the purchase of food through Preble Street's emergency food programs' Asylee Assistance Project, and \$32,500 in general operating support	\$42,500

John T. Gorman Foundation

Prosperity ME 62 Elm Street, Suite 2 Portland, ME 04101	n/a	PC	To support the provision of financial and housing education activities within Maine's immigrant, refugee and asylee communities	\$15,000
River Valley Healthy Communities Coalition PO Box 86 Rumford, ME 04276-0086	n/a	PC	To provide food to low-income food-insecure children, families and senior citizens in Oxford County.	\$15,000
Rockland District Nursing Association 61 Limerock Street Flanagan Community Center Rockland, ME 04841	n/a	PC	To support general operations for the provision of affordable, non-acute, in-home nursing services to low-income elderly residents of Rockland and seven surrounding communities	\$15,000
Rural Community Action Ministry Rr1 Box 2900 Leeds, ME 04263-0000	n/a	PC	To provide general operating to support at-risk individuals living in rural areas of Androscoggin, Kennebec and Oxford counties via services for basic needs, homelessness and hunger prevention	\$15,000
Seeds of Hope Neighborhood Center 35 South St Biddeford, ME 04005-2473	n/a	PC	To provide general operating support	\$10,000
Senator George J. Mitchell Scholarship Research Institute 75 Washington Ave Ste 2E Portland, ME 04101-2665	n/a	PC	\$150,000 to support the Promise Scholar program -- which combines college scholarships with personal support, leadership opportunities, and career development, and \$3,000 to provide sponsorship for the 2019 Mitchell Institute Fall Gala	\$153,000
Shalom House 106 Gilman St Portland, ME 04102-3034	n/a	PC	\$10,000 to provide support for an emergency fund that low-income clients may access to meet their basic needs, and \$10,000 in general operating support	\$20,000
South Portland Food Cupboard 130 Thadeus St South Portland, ME 04106	n/a	PC	To provide general operating support	\$15,000
State of Maine 1 State House Station Augusta, ME 04333	n/a	GOV	\$65,000 to support an evaluation of recent legislation passed to help low-income Mainers achieve self-sufficiency through the reduction of "cliff effects" that occur when increased earnings are not sufficient to cover the cost of lost public assistance benefits, and \$100,000 to support staffing, outreach and related expenses incurred on behalf of the Governor's Children's Cabinet.	\$165,000
Sunrise County Economic Council 7 Ames Way Machias, ME 04654-1424	n/a	PC	To support Family Futures Downeast, a two-generation education and workforce opportunity for low-income parents and their children in Washington County	\$180,000
Sunrise Opportunities PO Box 88 Machias, ME 04654-0088	n/a	PC	\$25,000 to support a pilot transportation program for people in recovery in Washington County, and \$75,000 to support the general operations of the Community Caring Collaborative	\$100,000
Tedford Housing PO Box 958 Brunswick, ME 04011-0958	n/a	PC	To provide general operating support	\$15,000

John T. Gorman Foundation

EIN: 01-0498551
Statement 24

The Center for Grieving Children 555 Forest Avenue Portland, ME 04101	n/a	PC	To provide food and transportation services to low-income New Mainer youth participants of the Intercultural Peer Support Program	\$10,000
The Center for Wisdom's Women 97 Blake St Lewiston, ME 04240	n/a	PC	To support Sophia's House, which provides shelter and support services to women with histories of chronic trauma and generational poverty	\$15,000
The Opportunity Alliance 50 Lydia Ln So Portland, ME 04106-2156	n/a	PC	\$25,000 to provide financial supports to individuals and families at risk of homelessness in order to maintain or secure their housing, \$5,000 to support the Home Energy Assistance Program, and \$10,000 to support the Michael J. Tarpinian Opportunity Fund	\$40,000
The Progress Center 5 Fore St Oxford, ME 04270-3306	n/a	PC	To support community meals and food distribution programs serving low-income people, including home-delivery to recently discharged hospital patients at risk for malnutrition	\$15,000
The Root Cellar 94 Washington Ave Portland, ME 04101-2630	n/a	PC	To support the Friends and Neighbors Network food model, which places recipients in charge of their own food needs through their active participation in the program with other neighbors	\$20,000
The Shaw House PO Box 1578 Bangor, ME 04402-1578	n/a	PC	To provide general operating support.	\$15,000
The University of Maine System 5703 Alumni Hall Ste 101 Orono, ME 04469-5703	n/a	GOV	To identify and match seniors needing support with volunteers who will provide weekly visits, occasional necessary transportation, and information on resources and programs that support independent living	\$30,000
The Urban Institute 2100 M Street NW Washington, DC 20037-1207	n/a	PC	To support the continued adaption of key components of the Urban Housing, Opportunity, and Service Together model to enhance and track outcomes for the Bangor Housing's Families Forward program.	\$92,798
Through These Doors PO Box 704 Portland, ME 04104-0704	n/a	PC	To support the provision of food for domestic violence shelter residents and to provide one-time financial assistance for basic needs such as food, clothing, medication or transportation	\$15,000
Tufts Medical Center / The Bingham Program 800 Washington St Box 811 Boston, MA 02111-1552	n/a	SOII	To join a pooled fund that will support Census efforts in hard-to-reach communities	\$10,000
Unitarian Universalist Association 24 Farnsworth Street Boston, MA 02210-1264	n/a	PC	To provide support for the purchase of non-food essentials for people in need	\$8,500
United Way Of Aroostook 830 Main St Presque Isle, ME 04769	n/a	PC	To support the purchase of clothing items that can not be sourced secondhand for distribution to low-income people accessing the Kids Community Closets in Aroostook County	\$5,000

John T. Gorman Foundation

United Way of Greater Portland 1 Canal Plz Ste 300 Portland, ME 04101-4083	n/a	PC	\$125,000 to support the work of the Thrive2027 Coalition, \$25,000 to support Women United and their Two-Generation work in Portland's East Bayside neighborhood; \$6,000 to support the Early Childhood Funders' Group, \$225,000 to support Portland ConnectED, a set of city-wide cradle-to-career strategies designed to impact kindergarten readiness, grade level reading, and postsecondary completion, and \$15,000 to support United Way of Greater Portland's 2019 Annual Campaign	\$396,000
University of Maine School of Law Foundation 246 Deering Ave Portland, ME 04102-2837	n/a	PC	To support the Juvenile Justice Reform Project, which develops and advocates for key reforms needed to ensure that youth involved in Maine's juvenile justice system can become successful adults	\$100,000
University of Southern Maine Foundation 96 Falmouth St Portland, ME 04103-4864	n/a	PC	To support the Promise Scholarship program.	\$2,500
University System Of New Hampshire, Keene State College 5 Chenell Dr Ste 301 Concord, NH 03301-8522	n/a	PC	To support evaluation of the Oxford County Resiliency Project.	\$30,000
Wabanaki Health and Wellness, Inc. 157 Park Street Bangor, ME 04401-5093	n/a	PC	To support community and cultural resiliency for Passamaquoddy Tribal Members who are recovering from opiate addiction.	\$25,000
Western Maine Community Action 20A Church Street Wilton, ME 04294	n/a	PC	To support Healthy Neighborhood's Shared Gifting process, which provides funds for physical beautification projects in Downtown Lewiston's Tree Street Neighborhood	\$37,275
York County Community Action Corporation 6 Spruce St Sanford, ME 04073-2917	n/a	PC	To support transportation services through the York County Transport program, targeting populations for whom no other specialized transportation funds are available	\$15,000
Youth Advocate Programs, Inc 2007 N 3Rd St Harrisburg, PA 17102-1815	n/a	PC	To enhance its contract with the Maine Department of Corrections, and to provide advocacy services to youth who are transitioning from Long Creek Youth Developmental Center into the community	\$50,000
Youth and Family Outreach 331 Cumberland Ave Portland, ME 04101-2957	n/a	PC	To provide general operating support	\$2,500

TOTAL GRANTS

\$6,613,493

STATEMENT 25

JOHN T. GORMAN FOUNDATION

FORM 990-PF: SUPPLEMENTAL STATEMENT

Year Ended December 31, 2018

01-0498551

Part VII-B, Line 5c: Statement Required by Regs. Section 53-4945-5(d)

1. Name and address of grantee:

Annie E. Casey Foundation
701 St. Paul Street
Baltimore, Maryland 21202-2311

2. Date and amount of the grant:

Grant #: 2018-006-ER
Approval Date: February 20, 2018
Grant Amount: \$75,000
Grant Period: January 1, 2018 – December 31, 2018

3. Purpose of the grant:

The John T. Gorman Foundation grant provided funds to the Annie E. Casey Foundation for the support of the Learn and Earn to Achieve Potential (LEAP) for Youth and Young Adults, which was used as a national match grant.

4. Amounts expended by the grantee (based on the most recent report):

The John T. Gorman Foundation grant funds to Annie E. Casey supported site technical assistance for its University of Southern Maine partnership as they implemented LEAP activities in Maine, as well as supported a national evaluation – which included an evaluation case study of Maine's LEAP work.

5. Statement regarding fund diversion:

To the best of John T. Gorman Foundation's knowledge, the grantee did not divert any portion of the funds from the purpose of the grant.

6. Dates of any reports received from the grantee:

Narrative and financial reports were due on February 11, 2019

7. Dates and results of verification of grantee's reports:

Narrative and financial reports were received on February 10, 2019 and approved on February 11, 2019.