

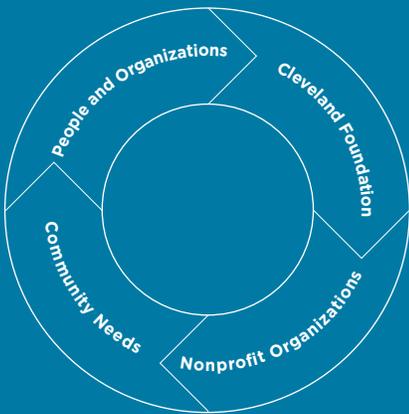
CONNECTING THE COMMUNITY



The Cleveland Foundation Report to the Community 2012

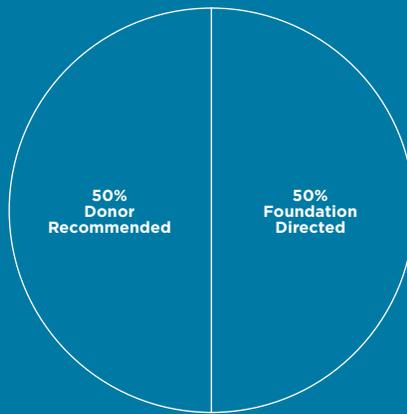
Who We Are

Established in 1914, the Cleveland Foundation is the world's first community foundation and one of the largest today, with assets of \$1.8 billion and 2011 grants of \$80 million. Through the generosity of our donors, the foundation improves the lives of Greater Clevelanders by building community endowment, addressing needs through grantmaking, and providing leadership on vital issues. The foundation tackles the community's priority areas — economic transformation, public school improvement, youth development, neighborhood revitalization, and arts advancement — and responds to the community's needs.



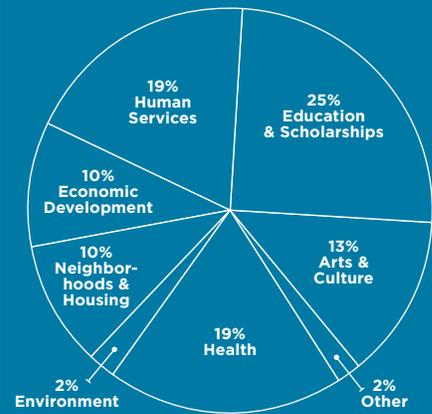
How You Help Our Community

People, families, and organizations give money to the Cleveland Foundation > The foundation invests the money for growth and income > The income on these investments is used to make grants to nonprofit organizations > Nonprofit organizations serve community needs



How Our Grantmaking Works

Because of the generosity of our donors, the Cleveland Foundation gives away about \$80 million annually to help preserve what you love about Greater Cleveland and create the change you wish to see in our city and region. About half of those charitable dollars are recommended by donors for specific causes; the remaining half is flexible, and is directed by board and staff to priority areas where our community is most vulnerable.

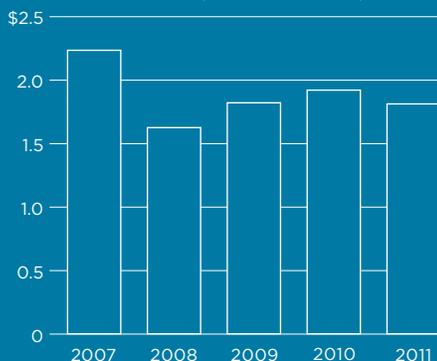


Where Your Dollars Go

As the largest grantmaking organization in Northeast Ohio, we award about 3,000 grants annually, ranging from a few thousand dollars to several million dollars, to causes important to our community. The chart above shows how our grants were distributed in 2011.

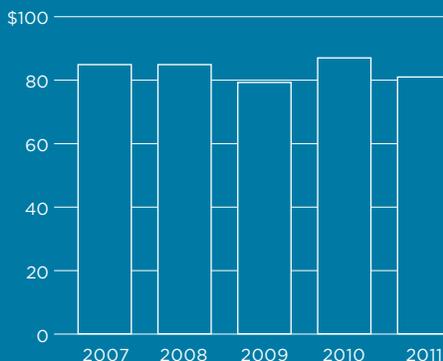
Endowment

Total Assets (dollars in billions)



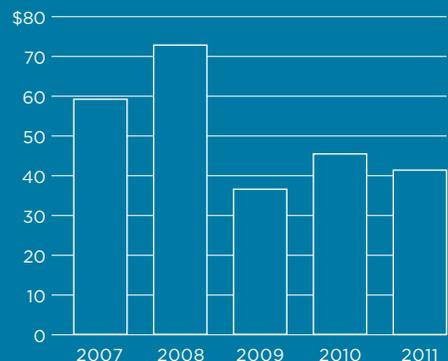
Grantmaking

Total Grants (dollars in millions)



New Gifts Received

Total Gifts (dollars in millions)



Often, people transforming our community alongside us are outside the spotlight's glare, quietly doing the heavy lifting to make Cleveland and Clevelanders better. This year, we are proud to highlight in this report seven people reaching out and connecting to our community in remarkable ways.

If **YOU** want a better Cleveland... **US** help build an even stronger foundation

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If you admire the good works of the
CLEVELAND
Foundation...

we invite you
to join us in our
MISSION



Dear Friends,

With a vigorous economic recovery remaining elusive, community foundations nationwide have been challenged not only to help mitigate the economic and societal pain, but to develop new approaches to shape a healthier, more stable civic future.

At the Cleveland Foundation, we have responded to this charge with gusto, but we have not acted alone. The core of our efforts has been the many partnerships formed to improve our prospects for success. Thus, we have titled this report “Connecting the Community.”

Beyond robust fundraising and thoughtful grantmaking that serve the community’s needs, these connections are rooted in our multiple roles as convener, catalyst, advocate, strategist—and attentive listener, with an open door and an open mind. Our partners have much to teach us, be they donors, grantees, government or corporate leaders, anchor institutions, other funders, or the people our grantees touch. Only by hearing all these voices can we respond in the best tradition of Cleveland’s community foundation.

**Your foundation maintains
a diversified portfolio in a volatile period**

Respond we did in 2011, authorizing \$80 million in grants to local nonprofit organizations, \$40 million of which was donor directed. Our grantmaking was constant even though—as anyone with a retirement plan can attest—the financial markets were turbulent. At year’s end, our assets stood at

\$1.8 billion, down 4 percent from the comparable 2010 figure. This decrease reflected a 1.6 percent loss on our investments—as well as our commitment to meet community needs in a tough economic climate through our consistent grantmaking.

Although continued volatility rattled global markets in the first half of 2012, we are pleased to report that our investment returns were 4.3 percent. We maintain a well-diversified portfolio, in line with our intent to preserve invested capital and achieve long-term real growth of our assets. Our long-term objective is a positive real return on investments over the majority of rolling five- and 10-year periods. Our 10-year return as of June 30, 2012, was 6.1 percent—short of our 8 percent goal, but comparable to industry benchmarks. We are managing prudently in a volatile era, and our portfolio is positioned for a slow-growth environment.

The benevolence of our donors inspires us

Despite an economic climate that negatively impacted everything from mortgages to personal investment portfolios, our donors supported us with a generosity that reminded us of why we are here. By year’s end, our Advancement team (formerly Gift Planning and Donor Relations) had received \$41 million in new gifts and additions to existing funds and 47 planned gift commitments with an estimated value exceeding \$42 million. Thus, gifts received and anticipated totaled \$83 million. This strong giving trend carried into 2012.

We were honored to receive \$12 million in May 2011 from the estate of Kay Crawford for an endowed fund to support the Crawford Auto Aviation Collection at the Western Reserve Historical Society. As significant and wonderful as such magnanimous gifts are, we also value the gifts of donors of more modest means whose philanthropy, while on a smaller scale in relative terms, may represent a substantial proportion of their personal assets. Every donor is special, and each one has a unique story.

These stories emerge as donors work with our knowledgeable staff, which is committed to helping each individual meet his or her charitable goals. Under the direction of Kaye Ridolfi, who joined us in November 2011 as our senior vice president for Advancement, we are expanding our fundraising efforts and intensifying our focus on serving and communicating with donors. We have revised our mission statement (see sidebar) to include an explicit reference to this partnership.

Our open door invites nonprofits to bring us their needs

Donors who give unrestricted or broadly restricted funds are key to the high-impact disbursements that typify our community responsive grantmaking program. Known as the doorway into the foundation, our responsive grantmaking team welcomes grant inquiries from nonprofit organizations. The total value of our community responsive grants was \$19 million last year.

Many partners know us through this far-reaching program that respects the diversity of community needs and is beholden to no single cause or constituency. In 2011, we authorized community responsive grants to help our prestigious arts organizations with audience development, prevent gang violence through community outreach, provide sorely needed human services, and much more.

Building on a Legacy of Leadership

Our mission, vision, and values guide the Cleveland Foundation into a second century, building on our evolution from a strong grantmaker to a strategic philanthropic leader among the world's approximately 1,700 community foundations.

Our Mission

The Cleveland Foundation's mission is to enhance the lives of all residents of Greater Cleveland, now and for generations to come, by working together with our donors to build community endowment, address needs through grantmaking, and provide leadership on key community issues.

Our Vision

The Cleveland Foundation will use the power of philanthropy to enable Greater Cleveland to be a great and global American city. Together with our donors and partners, we will make innovative, impactful, and internationally recognized contributions to the field of philanthropy.

Our Values

Integrity We live up to the highest ethical and moral standards as we fulfill our mission. We honor donor intent, invest wisely, grant fairly, and keep our community's trust.

Leadership We strive to be leaders in the community and in the foundation field. We lead the way in philanthropy, addressing community needs, and creating opportunities.

Innovation We catalyze new ideas. We think big, prize creativity, move nimbly, and are willing to take risks.

Service We take pride in serving our donors, grantees, partners, colleagues, and community. We listen, show respect, respond professionally, deliver excellence, and go the extra mile.

Learning We never stop learning. We are open to diverse ideas, challenge the status quo, learn from our successes and failures, seek best practices and improvements, and develop talent.

Partnership We embrace collaboration and inclusion. We are eager to partner, build strong relationships, and work as a team.

Donor dollars and community partners make innovation possible

While we listen and respond to the community, we collaborate with additional partners on game-changing initiatives in specific areas that we have defined as critical to Cleveland's future: economic development, public education reform, neighborhood revitalization, youth development, and arts advancement. In 2011, our board directed \$21 million to self-initiated work that promotes progress in these areas, which are outlined in this report.

We are also reporting on our Greater University Circle Initiative, which made significant headway this past year, and which stands out for concentrating our work in all five priority areas within one location.

For a comprehensive list of all our grants, go to www.ClevelandFoundation.org/ReportToCommunity12.

Thank you and welcome to leaders who make a difference

Our 15-member board of directors underwent substantial change earlier this year as four members who reached their 10-year term limit stepped down. All of them rendered exemplary service to the foundation and the community they love, and we will miss their wise counsel. We are grateful to former Chairman David Goldberg, Joseph Keithley, Dr. Maria Pujana, and Alayne Reitman.

New to the board are Dr. Hiroyuki Fujita, Sally Gries, Michael Petras Jr., and Larry Pollock. We are delighted to welcome this talented group, and look forward to an infusion of new ideas.

Can you imagine? 100 years as the people's foundation!

In 2014, the Cleveland Foundation will mark a century of community philanthropy. Our staff is planning for this landmark commemoration, which will provide us a unique opportunity to tell our story locally and nationally.

Because we are the world's first community trust, our celebration will also mark the centennial of the community philanthropy field. Within a year of our creation, community foundations were established—some with the assistance of our founder, Frederick Harris Goff—in Chicago, Boston, Milwaukee, and Minneapolis. Thus, we are participating in fieldwide centennial projects. We are proud that Cleveland will host the Council on Foundations' fall conference for community foundations, set for Oct. 20-22, 2014. We look forward to welcoming some 1,200 community foundation colleagues to our town.

Centennial preparation affords us an occasion to reflect anew on our bond with Cleveland and on how we can strengthen this connection as we progress toward our second century. It is a privilege to be your community foundation, and we will forever honor that trust.

Ronald B. Richard *Charles F. Bolton*

Ronald B. Richard
President & CEO

Charles P. Bolton
Chairman of the Board

October 2012



MARIBETH+REGIONAL TRANSIT AUTHORITY

"I'm task-oriented: Let's get a plan and implement it." That's the no-nonsense way Maribeth Feke, RTA's director of programming and planning, approaches her job. A self-described "worker bee," Maribeth labors behind the scenes, but her handiwork is visibly transforming Cleveland neighborhoods—notably, in Greater University Circle, where she has initiated transit projects critical to the area's ongoing development. "Greater University Circle is all about connections, and so is RTA," Maribeth says. "The partners put us at the table. It's phenomenal how we've all worked together." Maribeth believes this experience has expanded her job description, resulting in deeper engagement with other neighborhoods around their own transit projects—which matters to one who's dedicated to public service.

If you think of
CONNECTION
in digital terms...

consider the
DIFFERENCE
it makes in the offline world, too

Outreach to Partners: the Foundation of Successful Grantmaking

The Cleveland Foundation serves the greater good most visibly through grantmaking, with tremendous support from our donors, grantees, and community partners. In this report, you'll see examples of our strategic or targeted grantmaking, which requires our staff to draw on its field expertise to catalyze big, transformational initiatives with multiple partners and investors. You'll also read about our giving to address a broad spectrum of needs brought to us by the community. Here again, our grants are only part of the story. We also listen, link nonprofits with helpful resources, and strategize with them on how to fulfill their missions. The common thread is connection. An excellent example is unfolding in University Circle and six adjacent high-poverty neighborhoods. Here, scores of partners have rallied around a vision, a strategy, and a collection of projects known as the Greater University Circle Initiative, a point of pride for us. — *Robert E. Eckardt, Executive Vice President*

Institutional leaders anchor our team

Launched in 2005, the Greater University Circle Initiative is a landmark attempt to leverage the growth of the area's powerful anchor institutions to create jobs, build wealth, and stimulate reinvestment in six surrounding low-income neighborhoods and part of East Cleveland.

The city of Cleveland, the Greater Cleveland Regional Transit Authority, and three University Circle anchors—Case Western Reserve University, Cleveland Clinic, and University Hospitals—are among the public, private, and nonprofit partners the Cleveland Foundation has brought to the table. Realizing that their success is tied to the vitality of their neighbors, the anchor partners are channeling a portion of their combined \$3 billion a year in procurement spending into a “buy local” movement that includes the Evergreen Cooperatives.

Economic inclusion leaves no one behind

An innovative approach to employee ownership and job creation, the home grown Evergreen companies employ area residents who provide products and services to an expanding number of clients. We've helped launch a commercial laundry, an energy services firm, and the nation's largest urban hydroponic greenhouse, which will produce 3 million pounds of lettuce and 300,000 pounds of herbs a year after it opens late in 2012. By then, we expect approximately 100 individuals to have gained employment and pride as they build ownership stakes in the businesses where they work.

Transit-oriented projects are gateways

Phase one of University Circle's Uptown District—launched in 2010 with a \$1 million grant and a \$4 million loan from the Cleveland

Foundation—is essentially complete, and planning for the next two phases has begun with our \$160,000 grant. Anchored by the new home of the Museum of Contemporary Art Cleveland and the renovated and expanding Cleveland Institute of Art, Uptown is emerging as a vibrant, high-density urban space that will draw people together around housing, shops, restaurants, cultural attractions, and attractive public spaces.

Uptown will also be home to a rapid station that RTA will relocate to E. 119th Street and Mayfield Road from its current site at E. 120th Street and Euclid Avenue. At Cedar Hill, RTA's Cedar-University rapid station and bus terminal will undergo renovation. RTA received federal transit funds for both projects. And, the tangled intersection at E. 105th Street and Martin Luther King Jr. Drive—locally dubbed the “suicide circle”—will be rebuilt as part of future redevelopment in Upper Chester, the westernmost section of University Circle.

All these projects will improve safety and access to University Circle, which can be difficult to navigate by car or on foot. Just as critical, however, is the bridge these improvements will provide to the Greater University Circle neighborhoods, spanning the physical and psychological barriers that divided this community for decades.

We're building community together

In October 2011, leaders of the Greater University Circle Initiative agreed to continue working together for three more years. Their agenda comprises many more initiatives, some of which are described in greater detail in this report. We believe this comprehensive partnership could forge a new model of community development, especially for older industrial cities rich in assets, like Cleveland.

If you assume “everyday”
PEOPLE
are powerless...

open your eyes to a

GRASSROOTS
civics lesson

Engaged People Change Communities, and Community Engagement Changes People

Everyday folks possess extraordinary talents and gifts. That’s a bedrock principle underlying Neighborhood Connections, our small-grants and grassroots community-building program, which joined last year in launching the community engagement component of the Greater University Circle Initiative (see page 5). The premise is if we can unleash the creative energy of residents and institutional leaders, we can reweave the social fabric and collaborate to solve problems. With a “give-and-get” philosophy, Neighborhood Connections links Greater University Circle residents with opportunities, but also urges them to get involved: applying for grants up to \$5,000 to fund their promising ideas, hosting their neighbors in a living room dialogue, joining an Innovation Team to build cohesion among diverse people, or working on Neighborhood Voice, the resident-driven newspaper. Rising to the challenge, everyday people blossom as active citizens and community leaders.

Investments in people can transform neighborhoods

In September 2011, 14 newly minted phlebotomy technicians donned their white lab coats at NewBridge Cleveland Center for Arts and Technology. They represented NewBridge’s first graduating class; additionally, they reflected the triumph of the human spirit. Some had pursued training while working two jobs. Others had juggled complex school and day care schedules. One woman had faced homelessness during the program. But they all graduated.

Their success was replicated in July 2012, when 22 NewBridge graduates received their white coats. Seven were phlebotomists; 15 were in the inaugural class of pharmacy technicians.

NewBridge offers medical career training for adults and after-school arts programs for teens. The approach is patterned after the acclaimed nonprofit, Manchester Bidwell Corp., which began with a neighborhood arts program that founder Bill Strickland established in Pittsburgh in 1968. With the Cleveland Foundation serving as convener, catalyst, and an initial funder, NewBridge opened in Cleveland in the fall of 2010. More recently, we reaffirmed our support with a \$1.5 million grant.

NewBridge conducts classes in a contemporary, high-tech building in Midtown. After-school classes in ceramics, photography, digital arts, and music recording and production are designed to open young minds, instill a love of learning, and encourage youths to stay in school. Since opening, NewBridge has enrolled more than 350 ninth- and 10th-graders from more than 40 local high schools, with males accounting for an unusually high 55 percent of the participants.

Adult students master curricula developed with the input of Cleveland’s largest health care employers, including Cleveland

Clinic, University Hospitals, and MetroHealth Medical Center. Eighteen of the 36 graduates had found jobs with these and other providers by August 2012; one trainee chose to pursue higher education. Those hired are earning a combined \$678,300 a year in salaries and benefits. As employed NewBridge graduates acquire wealth, affordable housing options may provide the incentives they need to buy into the American dream.

Financially stable residents are neighborhood linchpins

Greater Circle Living, an employer-assisted housing program for people who work at University Circle’s anchor institutions, is one route to engaged residents and vibrant neighborhoods. In addition, we’re partnering with Cleveland Housing Network to help put Greater University Circle housing within reach of aspirants, including adult graduates of NewBridge and the employee-owners of the Evergreen Cooperatives (see page 5), many of whom rent in the area. An assessment involving 35 employee-owners revealed strong interest in home ownership.

Our \$380,000 grant to Cleveland Housing Network, announced late in 2011, will seed a Greater University Circle revolving loan fund pilot program available to qualified homebuyers. The agency will provide homebuyer counseling and financial literacy education for participants. It’s part of a broader strategy to encourage members of the community to buy, hire, and live locally.

Cleveland rec centers are magnets on summer nights

A \$200,000 grant from us kept four Cleveland recreation centers open until 11 p.m. four nights a week throughout the summer of 2012. Offering basketball and life skills workshops for young people, this “Cleveland Nights” program promoted learning and neighborhood stability through the Cudell, Glenville, Lonnie Burten, and Zelma George recreation centers.



MARIA + SHERWIN-WILLIAMS

When Maria Haller's troops take the field, the community wins. As director of community engagement for Sherwin-Williams, Maria encourages employee service, which goes well beyond a coat of paint. The giving spirit burns bright in Maria, who remembers the support that brought her to John Carroll University from her native Bryan, Ohio. "I'm paying it forward now," says the first vice president of Esperanza. She established a scholarship honoring her grandparents and late uncle: "I was so proud when their names were read aloud in the ballroom" as Esperanza awarded scholarships. Maria also serves as a Cuyahoga County Public Library trustee - and still carries her Williams County library card as a reminder of her roots.



ED + SCHOOL OF SCIENCE AND MEDICINE

It seems disrespectful to accede to Edgar Jackson's request to "call me Ed." The informality belies an illustrious medical career and a lifelong passion to eliminate demographic health disparities by encouraging minority youths to enter health care. Retired in name only, Ed advances the cause through many affiliations. A trustee of the Cleveland School of Science and Medicine, he relishes the students' success: "I knew these kids were talented, but I'm impressed by how brilliant they are. All they want is a chance." Ed believes young people yearn to serve. Who better to light their way? "Boys from single-parent homes see accomplished African-American men in suits," he says. "It tells them, 'You can have this.'"

If the quality of EDUCATION in Cleveland doesn't trouble you...

THINK about
the wasted potential

We All Have a Stake in Saving Our Kids—and Our Community

Among every 100 ninth-graders in Cleveland, 63 attain a high school diploma. Only 33 go to college—and just nine graduate within six years. We cannot silently stand by and sanction this squandering of lives and talent. Improving K-12 schooling is the primary thrust of the Cleveland Foundation's education initiative. But we've also partnered to make post-secondary education more accessible to low-income first-generation students. The Higher Education Compact of Greater Cleveland, which the Cleveland Foundation helped draft, was unveiled in October 2011. Housed at College Now Greater Cleveland, the compact has attracted signers throughout the community, including Cleveland and the Cleveland schools, Cuyahoga County, civic groups and foundations, and 15 regional colleges and universities. All have pledged to work to raise our community's abysmal college completion rate.

Assured of more autonomy, new schools pioneer new approaches

In the last five years, the Cleveland Foundation has invested more than \$10 million to improve the Cleveland Metropolitan School District and associated charter schools. We're bringing vast resources to bear because our region's decline is closely linked with the failure to educate our children.

In 2006, we teamed with the school district, the Cleveland Teachers Union, the George Gund Foundation, and other community partners to begin creating a high-performing school system within the old. The schools in this "portfolio" operate with a high degree of autonomy, testing promising new approaches in exchange for accountability. By 2011, the portfolio comprised 13 district schools and seven charter schools partnering with the district.

Focused on innovation and excellence, these schools as a cohort outperform their peers on almost every measure. Largely as a result of this portfolio approach, the number of Cleveland district and charter schools rated "excellent" or "effective" increased from 14 in 2006 to 37 in 2011.

A smart strategy can secure a better future

Acute challenges remain. The majority of the district's approximately 43,000 students do not receive a quality education. Some 55 percent of Cleveland's district and charter schools were in academic watch or academic emergency last year. In one-third of Cleveland neighborhoods, children have access only to failing schools.

We've been tackling this issue in Columbus as well as Cleveland. With our partners, we've pushed for changes in state law to

improve teacher quality, foster innovation, and strengthen ties between school districts and high-performing charter schools.

We inched toward these goals in 2011. Included in the biennial state operating budget were the framework for a new teacher evaluation system, some limits on seniority as the sole factor in layoffs, an "innovation school" and "innovation zone" designation to encourage new educational models, and authorization for Teach for America to enter Ohio. Funded in part with a \$750,000 grant from the Cleveland Foundation, this well-regarded program is placing up to 100 teachers annually in schools in and around Cleveland, starting with the 2012 school year.

In February 2012, Cleveland Mayor Frank Jackson revealed a sweeping plan to take the portfolio school concept to scale, tripling the number of Cleveland students enrolled in high-performing schools and eliminating failing schools within six years. The Cleveland Foundation had significant input in shaping this plan, and we and our partners contributed financially to its development.

After negotiation and compromise, the reform plan gained the support of the Cleveland Teachers Union and, ultimately, the approval of the Ohio Legislature and the signature of Gov. John Kasich. Again, the Cleveland Foundation played a prominent role in advocating for passage of the enabling legislation.

Among key provisions, the plan mandates a performance-based evaluation and compensation system for teachers and principals; eliminates seniority as the primary criterion in layoffs; creates a panel to review charter school sponsors; and permits the district to share local tax revenues with partnering charter schools, to lengthen the school day and year, and to intervene quickly in failing schools. We view this bold plan as a watershed in the continuing struggle to educate all of Cleveland's children.

If you're bearish about the local
ECONOMIC
climate...

there's a vibe in the air that could

BRIGHTEN
your forecast

Joining With Partners, We Extend Opportunity

In July 2012, more than 100 people turned out for the formal launch of a microcredit program to help capitalize small businesses in Cuyahoga County. It was a moment to savor for the public-private partnership that pooled \$4 million to fund microloans and another \$600,000 to support training and technical assistance for local entrepreneurs. To operate this program, the partners selected the Columbus-based Economic and Community Development Institute, a widely respected microlender with an eight-year track record of targeting underserved populations. The Cleveland Foundation made an \$85,000 planning grant to ECDI in 2011, followed by startup support of \$400,000. Even before the July launch, ECDI made eight local loans totaling \$163,000. The day after the event, ECDI received almost 100 phone calls, a dozen e-mails, and drop-in visits from a handful of potential loan applicants.

Our vision: a deeper microlending pool

Responding to the needs of “economically isolated” entrepreneurs, the Cleveland Foundation assembled a lending working group in early 2011. A subsequent study of the microcredit landscape in Cuyahoga County, which we commissioned with the Business of Good Foundation, estimated an unmet need of \$38 million in loans under \$50,000.

This gap affects primarily low-wealth people, including minorities, immigrants, and women. Their businesses may be too small to interest conventional lenders, or they may be deemed not creditworthy.

To begin addressing this issue, the working group invited Bad Girl Ventures to Cleveland. This Cincinnati-based nonprofit provides education and low-interest microloans to women who aspire to compete in the hard-hitting arena of business startups. We supported BGV's 2011 entry in this market with a \$25,000 grant. Impressed by the momentum this nimble program has generated, and viewing it as a feeder to the Economic and Community Development Institute, we granted an additional \$50,000 in 2012.

The microlending initiative is in its infancy, but we have made a strong start. The partnership we convened to tackle microfinance and bring ECDI to Cleveland is a model of collaboration, engaging the city of Cleveland, Cuyahoga County, the U.S. Small Business Administration, Huntington Bank, the Greater Cleveland Partnership, the Commission on Economic Inclusion, and the Business of Good Foundation. While helping to fulfill the dreams of would-be and actual entrepreneurs, a robust countywide microcredit program can bring all of us one step closer to a vibrant core city in a region on the rise.

Our grantees create jobs locally and regionally

The \$5.6 million we invested in economic development in 2011 supports a mix of enterprises. Much of this total funded the hands-on work of grantees such as NorTech, Team NEO, and JumpStart, which also received a collective \$2.2 million in early 2012 to continue their efforts in regional business attraction and development.

We partner with these world-class organizations because they advance five interconnected priorities: innovation and entrepreneurship; business growth; promotion of industry clusters, including advanced energy and flexible electronics; globalization; and a healthy core city. For us, the most urgent priority within our economic development strategy, where we have staked out a leadership role, is to catalyze a renaissance within our urban core.

Together, we're building a biomedical cluster

A driver of renewal in the urban core is BioEnterprise Corp., which received \$350,000 in 2011 and \$150,000 early in 2012 from us to continue developing a biomedical cluster in the Cleveland Health-Tech Corridor. This three-mile swath of Euclid Avenue is an offshoot of our work in Greater University Circle. It is home to more than 80 biomedical companies, 30-plus technology companies, and seven business incubators.

BioEnterprise aims to make Northeast Ohio a national hotbed of health care innovation and commercialization. With some 200,000 square feet of space recently opened—and already 90 percent leased—plus another 400,000 square feet under development, the Health-Tech Corridor is prime real estate for companies seeking to grow or to supply the four health care and three higher education institutions anchored nearby.



ERIC+OHIO CITY INCORPORATED

Although he grew up 65 miles away in Sandusky, Eric Wobser got his news from Cleveland media. It fanned his growing obsession with the city, which ripened into a full-blown love affair. Now, the union is official: An Ohio City resident since 2005 and executive director of Ohio City Incorporated since 2009, Eric has played a leading role in the revival of this historic “artisan neighborhood.” With an influx of young professionals and merchants committed to the area, and the presence of iconic institutions like the century-old West Side Market, “we’ve come together around a common vision in three short years,” says Eric, who also serves on the Cleveland Metropolitan School District’s board of education.



REBECCA+BIG BROTHERS BIG SISTERS

As vice president of programs for Big Brothers Big Sisters, Rebecca Kodysh appreciates the delicate balance in matching volunteer mentors with children who need adult guidance. “We help our volunteers work through common challenges, like breaking the ice at the start of the relationship,” Rebecca says. “Boundaries are important, too, as these friendships develop. Both parties need to feel comfortable.” Rebecca, a native Clevelander, spent two years as a teacher and parent advocate on the island of Maui before returning home and entering nonprofit management to support children and families. Now, she finds her richest rewards in successful match relationships that help youths recognize their potential. “Transforming lives,” she says. “That’s where it’s at.”

If young people's
FUTURE
doesn't concern you...

CONSIDER who
will fill your shoes one day

Cultivating a New Generation of Health Care Professionals

Greater Cleveland health care employers have more than 3,700 unfilled openings in the allied health field—and the gap between available jobs and people with the skills to perform them will widen as baby boomers retire. That's why our MyCom (My Commitment, My Community) initiative has joined the Northeast Ohio Health, Science, and Innovation Coalition to encourage regional hospital systems to invest in young people as the foundation of their future workforce strategies. Planning gears up in 2012, with opportunities for shadowing, field trips, summer jobs, and internships in 2013. In addition to building a pipeline of aspiring nursing assistants, respiratory therapists, and radiology technicians, this program aims to keep kids in school, make class work more relevant to them, and prompt them to think about completing higher education in two to four years.

MyCom aspires to mold youths into productive adults

From a Cleveland Foundation-inspired gathering in 2007 to shape youth development strategies, MyCom has grown into a \$4.8 million public-private partnership that helps children in eight diverse pilot neighborhoods advance toward stable, successful adulthood. More than 23,000 young people from kindergarten through high school have been touched by MyCom through after-school programs, summer jobs, leadership training, and other opportunities. Connecting participants with a web of services, positive experiences, and caring adults, MyCom prepares them to fulfill their potential and lead exemplary lives.

2011 brought validation of this model: Cuyahoga County, our principal partner, resolved to integrate its own youth services into MyCom, setting the stage to take MyCom to scale beyond the pilot neighborhoods. Maintaining this momentum, in March 2012 we granted \$825,000 to the Neighborhood Leadership Institute to develop a neighborhood engagement strategy for the eight MyCom neighborhoods and \$500,000 to Youth Opportunities Unlimited to directly fund 375 positions and leverage 1,625 additional positions in the MyCom summer jobs program. This grant, along with support from the city of Cleveland and the business community, funded employment for teens needing not only the income, but the structure, mentoring, and work experience.

Peacemakers reclaim kids from the streets

On call 24/7, the caring, committed members of the Cleveland Peacemakers Alliance reach out to young people threatened or victimized by street violence, as well as to the perpetrators. Trained in conflict mediation and crisis prevention and response, the peacemakers canvass city neighborhoods to build relationships with residents and broker peace.

Alliance members have confiscated illegal guns from children as young as 12. Through home visits, mentoring, and other strategies, they strive to improve kids' school attendance and grades, engage them in productive activities that fill out-of-school time, enroll them in workforce training, and help them resist the lure of Cleveland's 260 identified gangs.

With a \$600,000 grant to the Boys and Girls Clubs of Cleveland, we're supporting this mission. In 2012, the alliance's 10 gang outreach workers are recruiting a total 480 youths. Four case managers will link these youngsters with services.

Data from 2011 substantiate the peacemakers' effectiveness. Among 404 young people in the program, criminal activity decreased 39 percent, school attendance increased 675 percent, and 48 percent saw an improvement in family relationships.

The key to re-entry: getting hired

Released from incarceration, returning citizens need jobs, but finding work can be a challenge. Partnering with Cuyahoga County, we are piloting an innovative career development program that pairs for-profit businesses and nonprofit organizations to offer re-entrants hands-on instruction that leads to certification and jobs that pay living wages. Training in professional and "soft" skills started in 2012, with an initial goal of certifying 100 participants.

Lutheran Metropolitan Ministries directs training in food preparation at its Central Kitchen, which serves local homeless shelters. Led by Career Development and Placement Services, Expert Reclaim instructs trainees in home renovation. And VERGE Beauty Industry and Advisory Group developed Signature Style, a salon business that trains re-entrants to be licensed hair stylists, massage therapists, and manicurists.

If you view the **ARTS**
as merely a luxury...

IMAGINE how poor
we'd be without them

Cleveland Boasts a World-Class Arts Sector—so Why Does It Need to Change?

“Logic will get you from A to B. Imagination will take you anywhere.” So said Albert Einstein, a man who knew something about the workings of the human mind. Cleveland abounds with imagination—most visibly, through a lively tradition of excellence in arts programming. But the arts are weathering a turbulent period that raises questions about whether their tried-and-true approaches remain true today. That’s why the Cleveland Foundation has enabled our arts community to apply its creativity to what arts consultant Richard Evans terms “adaptive challenges.” They’re adaptive because people and their relationship to the arts have evolved, demanding a shift in institutional thinking and a commitment to develop what Evans calls “next practices.” For those who seize the moment, today’s turbulence could beget undreamed-of opportunities.

A healthy arts sector drives economic growth

In June 2011, the foundation announced Engaging the Future, a three-year program that enlisted 11 established arts and cultural organizations of varying size—from the Cleveland Orchestra to GroundWorks Dancetheater—in an all-out effort to adapt to rapidly shifting demographics, technologies, and tastes. Its goal is to attract the younger, more diverse, more tech-savvy audiences these organizations need to survive for generations to come.

The imperative is both artistic and economic. In addition to their intrinsic value, the 182 nonprofits that receive public funds from Cuyahoga Arts & Culture employ more than 8,700 people, according to the group’s 2011 report. These organizations account for more than \$286 million annually in direct spending, including more than \$140.7 million in salaries.

Engaging the Future launched with a first-year total of \$1.44 million in operating grants for the participants, which receive comparable levels of sustaining support for the remaining two years. Internationally known consultants—EmcArts, which specializes in innovation for change, and Annabel Jackson, an arts evaluation expert—are guiding these organizations in reassessing not only their programming, but more fundamental elements such as their core mission and internal culture. The participants have put their hearts into this work.

Like several aspects of Engaging the Future, the kickoff seminar in November 2011 was open to Cleveland’s full arts community. For the program participants, this event was the first in an intensive series of seminars, hands-on workshops, and individual coaching. A subset of these organizations will prototype new approaches in a special program called Incubating Innovation.

Creative Fusion brings international artists to Cleveland

Where most people see deterioration, Chilean architect-designer Cristián Schmitt saw opportunity. Aware of retail vacancies in Cleveland, visiting artist Schmitt created SHOPBOX, the prototype for a portable enclosed retail space that a vendor could rent and move around, avoiding the expense of leased space and injecting street-level vitality into neighborhoods pockmarked by boarded-up storefronts. One fortunate result of Schmitt’s creativity: BookBox, a mobile unit that has expanded Cleveland Public Library’s community outreach.

SHOPBOX is one highlight of Creative Fusion, the foundation’s international artist-in-residence program, which to date has brought 16 visiting artists to Cleveland. Eleven visitors from Turkey, South Africa, Chile, Cuba, and Uganda have returned home. From September through November 2012, five artists from Armenia, Chile, India, Mexico, and Sri Lanka are here, creating and sharing their work while experiencing three months in an American heartland city.

No other community foundation offers a program like this one. Selected and hosted by local cultural institutions, the artists hail from cultures not well represented in Cleveland. As they conduct classes and workshops, create and perform, and collaborate with local arts organizations, they provide the benefits of creative exchange with their Cleveland counterparts, hands-on learning experiences with students of all ages, and deep engagement with the general public.

Creative Fusion is attracting attention. Presentations at two national conferences in October 2011 drew strong interest from arts grantmakers and an invitation for the foundation to join a national dialogue on international cultural exchange.



ISABEL+RAINEY INSTITUTE

For Isabel Trautwein, the magic moment arrives when “one day, you feel the child connecting to the instrument in a very personal way. It’s not something you can teach.” Isabel, a member of the Cleveland Orchestra’s first violin section, launched a strings program at the Rainey Institute in Cleveland’s Hough neighborhood in 2011. This year, 50 children ages 6 through 11 are learning the complexities of classical music, with stringed instruments donated by the orchestra. Parents report that their kids practice at home and teach their younger siblings. One boy even took his violin on a camping trip. “Our children are performing at Severance Hall and other venues they might never have seen,” Isabel says.



MICHAEL + ASIAN SERVICES IN ACTION

Nothing pleases Michael Byun more than “growing our own” at Asian Services in Action, which he has headed as executive director since 2009. He speaks proudly of the Burmese immigrant with “a large family, little English, and lots of potential,” who rose from cleaning ASIA’s offices to joining its staff as a farm leader. ASIA cultivates land as well as people, helping immigrant and refugee farmers in line with its mission to empower the Asian-American/Pacific Islander community. Michael, who is of South Korean descent, grew up on the West Coast and moved to Cleveland in 2002. He found a home at ASIA, where inspiring stories like the former cleaner’s prove that self-sufficiency is within reach.

If you wonder where your
CHARITABLE
dollars go...

just look at the breadth
of our
GRANTMAKING

What's Your Passion?

Maybe it's children with special needs, or Alzheimer's disease patients, or addiction recovery, or the environment. If you're a prospective donor, you should know you can give through the Cleveland Foundation to all the beloved charitable organizations that serve your personal interests. If you're a potential grantee, know that you don't have to be the CEO of an anchor institution or a mayor pressing a major initiative to get our attention. As your community foundation, we work across all sectors, listening to every voice and welcoming grant inquiries and applications from nonprofit organizations of all sizes. Our community responsive grants come in all sizes, too. Responding to a broad range of needs throughout the community, we likely support causes dear to your heart, whether you aspire to make a gift or apply for a grant. Won't you join us?

Strengthening the community: It goes beyond funding

In 2011, we made approximately 190 community responsive grants with a total value of \$19 million. The smallest grants were in the \$5,000 range; the two largest were each \$1.5 million.

In evaluating grant requests, we adhere to four priorities:

- Provide access to services and programs for underserved populations
- Strengthen nonprofit organizations
- Test new ideas
- Support policy and advocacy work that can move the community forward

We move nimbly to address critical needs, linking organizations with funds and expertise, and providing a safe space where nonprofit leaders can air tough issues. The lingering downturn, for example, has challenged some savvy grantees who appreciate the opportunity to explore radical ideas such as changing their services or merging with a peer.

Here's a glimpse of our recent community responsive work.

Asian immigrants reap benefits from farming programs

In Cuyahoga Valley National Park, Asian immigrants and refugees are applying their native farming skills to achieve self-sufficiency in a strange new culture. They're part of a special project of Asian Services in Action, which is helping these low-income people adapt to a North American agricultural climate and take advantage of the trend toward locally grown food. In a pilot project, participants consumed a portion of their harvest and sold the rest to local farmers' markets and other customers. With subsequent

plans to enroll 100 refugees in an expanded agricultural program, ASIA turned to us; we authorized a grant of \$127,820. Some produce harvested during this phase will help stock ASIA's food pantry, extending the program's benefits to the wider community.

City youngsters learn to make beautiful music

A \$100,000 grant is helping fund a pilot program at the Eleanor B. Rainey Memorial Institute that gives children access to professional musicians. Spearheaded by Isabel Trautwein, a first violinist with the Cleveland Orchestra, and based on Venezuela's El Sistema Project, the Rainey program offers youths the opportunity to learn to play a musical instrument and to join an orchestra. This training teaches children social skills, boosts their self-esteem, and exposes them to the miracle of classical music.

A cherished family shares its treasures

The legacy of the late Frank and Nancy Porter permeated the community as we distributed modern art from the couple's extensive collection. The artwork was part of the Porters' 2003 bequest, the largest gift in our history at that time. Much of this art was auctioned, raising funds for our Frank H. and Nancy L. Porter Fund, but 29 pieces remained. Local nonprofits were invited to view these artworks online and submit requests for their favorites. Ultimately, we divided this special donation among numerous grantees, including:

- WIRE-Net, which will install its two sculptures in 2015 at the redesigned Max Hayes High School
- New Avenues to Independence, recipient of "Interlock," an abstract work by former Cleveland Institute of Art President David Deming that is now in the organization's therapy garden
- University Hospitals, which obtained David Annesley's "Big Ring," to be installed at UH Ahuja Medical Center

NEW GIFTS



In 2011, the Cleveland Foundation was honored to receive \$41 million in new gifts of all sizes from people representing all segments of the community. Whether you directed your gift to specific causes that matter most to you or entrusted the allocation of your funds to us, you share with all our donors a selflessness and sense of community that magnify the significance of your support well beyond its dollar value.

It is no stretch to say that this altruism is life-changing for the people and organizations on the receiving end. The acknowledgments on the following pages can only begin to express our deep gratitude to you for having judged us worthy of your support. Thank you for your devotion to our community and your faith in the Cleveland Foundation.

— *Kaye Ridolfi, Senior Vice President for Advancement, who joined the foundation in November 2011*

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Ann Jones Morgan
Patrick and Amy Mullin

N

Robert D. and Janet E. Neary
John G. and Karen R. Nestor

O

John F. O'Brien

P

Stanley C. and Elaine C. Pace
Margaret Patch

Taru Patel, M.D. and Mahesh Patel, M.D.
Frederick W. Pattison
Katherine and James Pender
Arvid S. and Marianne B. Peterson
David R. Pierce and Philip M. Cucchiara
Florence K.Z. Pollack
Caroline Brewer Goff Prentiss

R

Stuart Reader
William Hughes Roberts
Marjorie A. Rott
James L. Ryhal Jr.

S

Lynn M. Sargi
Karen Sayre
John C. and Judy Schantz
Megan Schlick and Martha H. Marshall
Robert and Cynthia Schneider
Catherine Swing Sellors
Phyllis and Gerard Seltzer, M.D.
Holly Selvaggi
Clara and John Sherwin Jr.
Harry D. Simmons, M.D.
Tracie Speth
Robert V. and Florence W. Spurney
Cathy A. Stawarski
Billie Howland Steffee
Ralph E. and Barbara N.* String
Faith H. and Herbert J.* Swanson

T

Charles H. Teare
Joseph H. and Ellen B. Thomas

V

Robert F. and Beverly M. Vail
David and Ellen Van Arsdale
Mary and Cedomil* Vugrincic, M.D.

W

Stanley L. Wasacz
William Wendling and Lynne E. Woodman
Richard B. and Janet K. Werner
Marilyn M. and Alan H. Wilde, M.D.
Hazel Martin Willacy
George E. and Rolande G. Willis
Genevieve and A. Carter Wilmot
Robert Wismar Jr.
Lois Wyche

Z

Patrick M. Zohn
Malcolm and Helene* Zucker
Angelica Zylowski

FUNDS

As of December 31, 2011

New Named Funds and Planned Gifts

Richard F. Coyne Charitable Gift Annuity #6 established by Richard Coyne

Frederick C. and Kathleen S. Crawford Fund established by Kathleen Crawford

Joy E. Garapic Charitable Gift Annuity #2 established by Joy Garapic

Geis-Saint Stanislaus Preservation Fund established by Katherine Geis

Clive and Mary Hamlin Fund established by Clive and Mary Hamlin

June Louise Mancuso Charitable Gift Annuity established by June Louise Mancuso

McLaughlin Family Fund established by Thomas McLaughlin

James A. Nelson Fund for Theatre in Cleveland established by James Nelson Trust

E.J. Rothman Charitable Gift Fund established by E.J. Rothman Trust

Albert S. Terry Fund established by Albert Terry Trust

Beverly M. Vail Charitable Gift Annuity established by Beverly Vail

Patricia M. Wasacz Arts Fund established by Stanley Wasacz

New Donor-Advised Funds

David S. and Robyn V. Barrie Family Fund established by David S. and Robyn V. Barrie

George and Jeanie Belhobek Donor-Advised Fund established by George and Jeanie Belhobek

Cavaliers Youth Fund established by Cavaliers Operating Co.

William F. Cody Foundation established by William F. Cody and Regina Rubin Cody

William T. and Beverly B. Dahms Fund established by Beverly Dahms

Timothy and Pamela Desanzo Family Fund established by Timothy Desanzo

Amy R. and Jeremy S. Goldberg Philanthropic Fund established by Brenda Goldberg

Stacy K. and Michael E. Goldberg Philanthropic Fund established by Brenda Goldberg

Diane Davies Griffin Educational Fund established by Bruce Griffin

Janet L. Miller Fund established by Janet Miller

Podl Family Fund established by Tod and Joellen Podl

John S. and Winifred H. Raleigh Donor-Advised Fund established by John S. and Winifred H. Raleigh

Jennifer G. and Boris E. Rapoport Philanthropic Fund established by Brenda Goldberg

Ludvik and Mildred Rychtera Sokol Greater Cleveland Czech Museum Fund established by Mildred Rychtera Irrevocable Trust

Tyrian Fund established by Dagmar Braun-Celeste

New Scholarship Funds

Lewis B. Balslew Scholarship Fund established by Sylvia Page Trust

Maureen Kennedy Berg Scholarship Fund established by Maureen Berg

Renee Drefahl Spirit of Life Scholarship Fund established by Steven Drefahl

Improve Consulting and Training Group: Bagby, Palmer Memorial Scholarship Fund established by Selwyn Cooper and Ellen Burts-Cooper

McNeil Scholarship Fund established by Valdia McNeil Burns

Perlman Foundation PK Management Employee Scholarship Fund established by Gregory Perlman

New Organizational Endowment Funds

Stanley I. and Hope S. Adelstein Fund for the benefit of the Nature Center at Shaker Lakes established by the Nature Center at Shaker Lakes

Cleveland Metropolitan Bar Foundation Marvin and Sue Sicherman Excellence in Bankruptcy Award Fund established by Cleveland Metropolitan Bar Foundation

Dutch Harley East Cleveland Township Cemetery Tree Fund established by East Cleveland Township Cemetery Foundation

Endowment Fund of Forest Hill Church, Presbyterian established by Forest Hill Church, Presbyterian

Geauga United Way Legacy Fund established by United Way Services of Geauga County

Lifebanc Fund established by Lifebanc

Metro Catholic School Fund established by Metro Catholic Parish School

Edward and Betty Sloat Endowment Fund for Youth Services of Lutheran Metropolitan Ministry established by Lutheran Metropolitan Ministry

Virginia Marti College Foundation Fund established by Virginia Marti College Foundation

Supporting Organizations and Committee-Advised Funds

(As of Dec. 31, 2011)

City of Cleveland's Cable Television Minority Arts and Education Fund
Directors: Kathy Allen, Robert E. Eckardt, Maria L. Haller, Steven A. Minter, Mia L. Moore, Yvonne Pointer, Terrell Pruitt, Martin J. Sweeney, Hilary S. Taylor

Alton F. and Carrie S. Davis Fund
Directors: Marjorie M. Carlson, Mary Jane Davis Hartwell, Samuel Hartwell, Harvey G. Oppmann

Fenn Educational Fund Advisory Committee
Directors: Timothy Brimus, JoAnn Charleston, M. Judith Crocker, Antoneya Ellis, Ronald V. Johnson Jr., Ramona Lowery, David Mikita, Eric Myles, Craig Peer, Debbi Perkul, Carol Rivchun, Karen Thompson, John Zitzner

Higley Fund
Directors: James M. Delaney, Bruce G. Higley, Michael J. Hoffmann, Janet E. Neary, Sharon Higley Watts

Medical Mutual of Ohio Charitable Foundation
Directors: Inajo Davis Chappell, Michelle Gillchrist, Sharon Sobol Jordon, John T. McBride, M.D., Susan M. Tyler

Sherwick Fund
Directors: Dennis Lafferty, Randell McShephard, Christopher Ronayne, Heather Sherwin, John Sherwin Jr.

Billie Howland Steffee Family Fund
Directors: Susan W. Cargile, Susan Lajoie Eagan, Ph.D., Robert E. Eckardt, Jon H. Outcalt, Billie Howland Steffee

Sullivan Scholars Foundation
Directors: Caprice H. Bragg, James Malone, Karen D. Melton, Frank Sullivan, Sandra S. Sullivan, T. Sean Sullivan, Lorraine Vega

Thatcher Fund
Directors: Lisa Bottoms, Lisa Manning, Rev. Felix Muniz, Randy M. Thatcher

Time Warner Cable/Cleveland City Council Neighborhood Technology Fund Advisory Committee
Directors: Terrell Pruitt, Joe Richardson, Rev. Dr. Stephen Rowan, Martin J. Sweeney, Jay Westbrook

Treu-Mart Fund
A supporting organization of both the Cleveland Foundation and the Jewish Community Federation of Cleveland
Directors: Henry J. Goodman, Mary Louise Hahn, Susan Hollingsworth, Steven A. Minter, Amy M. Morgenstern, Albert B. Ratner, Arthur W. Treuhaft

FINANCIAL SUMMARY

Significant volatility in global markets impacted the Cleveland Foundation's investment portfolio in 2011, especially during the second half. We were encouraged by a strong start to 2012, though we expect continuing market instability.

2011: Another Rough Ride for Investors

Investors were buffeted by market fluctuations in 2011. The foundation's total assets declined 4 percent to approximately \$1.8 billion at year-end from approximately \$1.9 billion at the end of 2010. The third quarter was especially challenging, with Congress deadlocked over deficit reduction, S&P downgrading the nation's credit rating, and financial instability pervading Europe. A fourth-quarter rebound mitigated our overall investment losses, which were 1.6 percent for the year.

Also factoring into the decrease in our total assets were authorized grants of \$80 million as we identified and responded to community needs. Gifts received totaled \$41 million, reflecting the generosity of our donors despite the ongoing challenges in the markets and the economy. We maintained our focus on cost control, as evidenced by our reduced administrative expenses.

Improved Investment Returns Marked First-Half 2012

We are happy to report that, although our other investment pools posted negative results, the Cleveland Foundation Pooled Investment Account ended the year slightly positive, up 0.2 percent. This pool, which holds approximately \$280 million in assets, comprises most of our donor-advised and organizational endowment funds.

Although global markets were volatile in the first half of 2012, our investment returns were 4.3 percent. We received \$27.5 million in gifts in the first half—a strong start to the year—and we ended the first half with assets of \$1.82 billion. We plan to authorize 2012 grants at or above the amount we granted last year.

We Take a Long-Term View

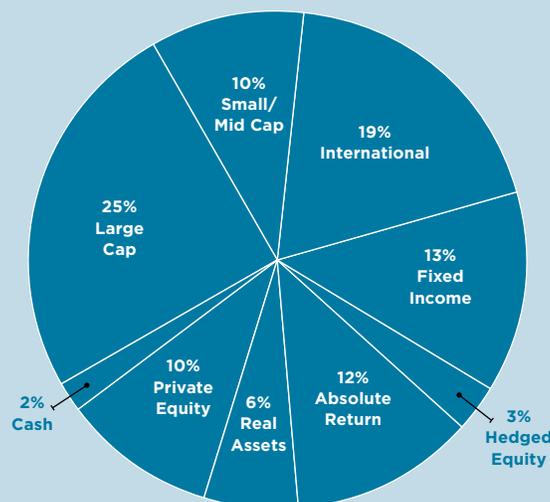
Our endowment portfolio had annualized investment gains of 6.1 percent over the 10 years ended June 30, 2012, comparing favorably with an S&P 500 increase of 5.3 percent in the same period. Though short of our 8 percent target, our performance was notable during this generally difficult, volatile time for investors. We manage not from quarter to quarter or year to year, but to specific, long-term investment objectives: Preserve capital and achieve a real return over the majority of rolling five- and 10-year periods. A real return is any return in excess of our spending (generally, 5 percent of assets) and inflation.

Diversification and use of best-in-class investment managers are keys to meeting our long-term objectives. Going forward, the majority of our portfolio will be exposed to equity markets, but we will use hedged equity, fixed income, and absolute-return investments to minimize volatility and real assets to protect against inflation.

With the 2012 implementation of our new, integrated computer software system, we anticipate improved service to all our valued stakeholders. User-friendly portals into the system will put more timely information at your fingertips, increase your access to historic data, and simplify the process of transacting business with the foundation. We are excited about this technology upgrade and eager to receive your feedback as we continue seeking to serve you better.

Kate A. Asbeck
Senior Vice President and Chief Financial Officer

Asset Allocation*



EXTERNAL ADVISORS AND BANKS

As of June 30, 2012

African-American Philanthropy Committee

Teresa Metcalf Beasley
Charles Burkett Jr.
Ellen Burts-Cooper, Ph.D.
Inajo Davis Chappell
Vivian Hairston
Awilda Hamilton, Ph.D.
Constance Hill-Johnson
Justin Horton
Ronald V. Johnson Jr.
Ndeda N. Letson
Bracy Lewis
Tracy Oliver
Melvin G. Pye Jr.
Robyn Minter Smyers

Audit Committee

James M. Delaney

Bank Trustees Committee

Paul Clark, PNC Bank
James M. Malz, JPMorgan Chase
Sean Richardson, FirstMerit Bank
Timothy L. Swanson, KeyBank
Daniel P. Walsh, Huntington National Bank

Investment Committee

David R. Boles
John Sherwin Jr.
Robert C. Smith

Lake-Geauga Advisory Committee

Dennis E. Eckart
Nancy Guthrie
Bert Holt
John D. Leech
Raphael Omerza
Todd R. Ray
Daniel D. Smith

Philanthropy and Communications Committee

Tana Carney
David Geyer
David Goldberg
Ellen Halfon
Jane Lisy
Michael Novak
Marcia Wexberg

Scholarship Selection and Advisory Committee

Deborah Daberko
Santiago Feliciano Jr.
JoAnn Glick
Lisa Hunt
Karen Kopp
Nancy-Clay Marsteller, Ph.D.
Mary Lynne McGovern
Natividad Pagan
Judge Michael Ryan
Christopher Sedlock
Pamela E. Smith
Ryan Temple
William Woods, Ph.D.
David Yen
Deborah Yue
Zulma Zabala

Suite 1300 Board of Directors

Leslie A. Dunford
Quentin L. McCorvey Sr.
Brian Vulpitta

Investment Options

The Cleveland Foundation provides donors with a variety of investment options and strategies to choose from for the fund they establish, allowing them to select the one that will help them meet their philanthropic objectives. Many donors select the Cleveland Foundation Pool due to its diversification benefits, best-in-class manager philosophy, and enhanced oversight by an independent investment consultant. For donors interested in a passive index approach to investing, the foundation offers a pool composed of Vanguard funds. Donors may also select from a number of banks, investment firms, and individual advisors. The foundation has active relationships with the following:

Banks and Investment Firms

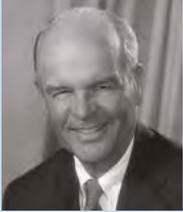
BNY Mellon Wealth Management
Carnegie Capital
Fairport Asset Management
FirstMerit Bank
Glenmede Trust Co.
Hartland & Co.
Huntington National Bank
JPMorgan Chase
Karpus Investment Management
KeyBank
Northern Trust
PNC Bank
U.S. Bank

Individual Advisors

BDS Financial Service Corporation
Cedar Brook Financial Partners
Merrill Lynch
Robert W. Baird & Co.
UBS Financial Services
Wells Fargo Advisors

BOARD OF DIRECTORS

As of June 30, 2012. Brief biographies of the Cleveland Foundation Board of Directors can be found at www.ClevelandFoundation.org/Board



**Charles P. Bolton,
Chairman**

Partner and Chairman,
Brittany Stamping
*Appointed 2004 by the
chief judge, U.S. District
Court, Northern District
of Ohio*



**James A. Ratner,
Vice Chairman**

Executive Vice President,
Forest City Enterprises
*Appointed 2006 by the
administrative judge, 8th
Ohio District Court of
Appeals*



**Frank C. Sullivan,
Vice Chairman**

Chairman and CEO,
RPM International
*Appointed 2004 by the
Bank Trustees
Committee*



**Inajo Davis
Chappell**

Partner, Ulmer & Berne
*Appointed 2010 by the
Board of Directors*



Paul J. Dolan

President, Cleveland
Indians
*Appointed 2008 by the
Bank Trustees
Committee*



Hiroyuki Fujita

President and CEO,
Quality Electrodynamics
(QED)
*Appointed 2012 by the
Board of Directors*



Sally Gries

Founder and
Chairperson, Gries
Financial
*Appointed 2012 by the
Bank Trustees
Committee*



Frederick R. Nance

Regional Managing
Partner, Squire, Sanders
& Dempsey
*Appointed 2005 by the
Bank Trustees
Committee*



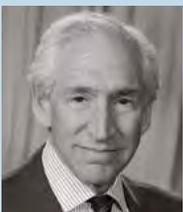
Michael Petras Jr.

CEO, AssuraMed
*Appointed 2012 by the
Board of Directors*



Sandra Pianalto

President and CEO,
Federal Reserve Bank of
Cleveland
*Appointed 2004 by the
Board of Directors*



Larry Pollock

Managing Partner,
Lucky Stars Partners
*Appointed 2012 by the
Board of Directors*



**Beth Oldenburg
Rankin**

Civic Volunteer
*Appointed 2011 by the
presiding judge,
Cuyahoga County
Probate Court*



**The Rev. Dr. Stephen
Rowan**

Senior Pastor, Bethany
Baptist Church
*Appointed 2009 by the
Bank Trustees
Committee*



Ratanjit S. Sondhe

Founder and CEO,
discoverhelp
*Appointed 2008 by the
Center for Community
Solutions*



Ernest L. Wilkerson Jr.

Managing Partner and
Founder, Wilkerson &
Associates
*Appointed 2011 by the
mayor of Cleveland*

STAFF

As of June 30, 2012

Executive Office

Ronald B. Richard
President and CEO

Sylvia Pérez
Chief of Staff and Manager for
Governmental and International
Affairs

Kimberly Sabo
Executive Assistant to the President
and CEO

Grantmaking

Robert E. Eckardt
Executive Vice President

Lisa L. Bottoms
Program Director for Human Services
and Child and Youth Development

Shilpa Kedar
Program Director for Economic
Development

Lillian A. Kuri
Program Director for Architecture,
Urban Design, and Sustainable
Development

India Pierce Lee
Program Director for Neighborhoods,
Housing, and Community
Development

Helen W. Williams
Program Director for Education

Walter W. Wright
Project Director for Greater
University Circle Community
Wealth Building Initiative

Kathleen A. Cervený
Director of Institutional Learning and
Arts Initiatives

Kathleen A. Hallissey
Director of Community Responsive
Grantmaking

Nelson S. Beckford
Program Officer

Kara K. Copeland
Program Officer

Kevin L. McDaniel
Program Officer

Paul Putman
Program Officer

Diane C. Kaszei
Grants Manager

Janice M. Cutright
Records and Knowledge Manager

Mary Clare Donnelly
Executive Assistant to the Executive
Vice President

Annabel Bryan
Program Assistant

Rennae Coe
Program Assistant

Harold J. Garling Jr.
Program Assistant

Ciba Jones
Program Assistant

Sarah L. King
Program Assistant

Debra Slocum
Program Assistant

Toni White
Program Assistant

Charlotte Morosko
Grants Administrator

Karen Bartrum Jansen
Grants Assistant

Denise Ulloa
Grants Assistant

Patricia A. Berke-Takacs
Records Technician

Joyce R. Wilson
Records Technician

Advancement (Fundraising)

Kaye Ridolfi
Senior Vice President for Advancement

Terri Eason
Director of Gift Planning

Ginger Mlakar
Director of Donor Relations

Cynthia Naegele
Director of Principal Gifts

Ann Fairhurst
Lake-Geauga Officer

Michelle Fritz
Donor Relations and Communications
Officer

Judy Salm
Donor Relations Officer

Karen Sayre
Donor Relations Officer

Marvelous R. Baker
Scholarship Officer

Donna C. Johnson
Operations Administrator

Michelle Blackford
Donor Relations Associate

Pam Zoltowicz
Research Associate

Linda F. Gersten
Gift Planning Assistant

Maureen Forrest
Donor Relations and Scholarship
Assistant

Anna McDonald
Lake-Geauga Assistant

Investment and Finance

Kate Asbeck
Senior Vice President and Chief
Financial Officer

Kathy S. Parker
Controller

Elizabeth Honold
Manager of Investments and Finance

Mary J. Clink
Assistant Controller

Tammi Amata
Accounting Manager

Dorothy M. Highsmith
Senior Accountant

Judith A. Corey
Fund Accountant

Christine M. Lawson
Finance Associate

Carmela Beltrante
Executive Assistant to the Senior Vice
President and Chief Financial Officer

Human Resources

Monica Brown
Director of Human Resources

Danielle M. Hanna
Human Resources Manager

Public Affairs

Cynthia V. Schulz
Director of Public Affairs and Strategy

Susan Christopher
Public Relations Officer

Elizabeth McIntyre
Public Relations Officer

Terry Pederson
Writer/Editor

Debra A. Thornsberry
Public Affairs Assistant

Information Systems

James T. Bickel
Director of Technology

Jamie McGuire
Programmer/Analyst

Governance and Administration

Leslie A. Dunford
Vice President for Corporate
Governance and Administration

Janet M. Carpenter
Administrative Services Manager

Pamela Jaffe
Assistant Corporate Secretary

Laura Lash
Administrative Services Assistant

Gail Stachnik
Receptionist

Our Strategic Goals

Without our dedicated staff of talented employees, the Cleveland Foundation could not continue to fulfill its mission of enhancing the lives of Greater Clevelanders through grantmaking, leadership, and community endowment. As part of our new strategic plan, our staff has committed to six high-level strategic goals that will steer our internal and external priorities for the period from 2012 through 2016:

GRANTMAKING

Enhance grantmaking outcomes and leverage support from our partners and donors

We are committed to continuously evaluating and strengthening the impact of our grantmaking. We will better engage donors in our work and increase leverage from local and national funders.

FUNDRAISING

Increase our focus on donors and fundraising

We strive to more closely involve and highlight our donors. We will grow our endowment, emphasizing fundraising and broadening our base of supporters, as a key priority of our senior leadership team and board.

INVESTMENT

Grow and protect our assets

We aim for a positive real return on investments over rolling five-, seven-, and 10-year periods. We will increase our focus on mission- and program-related investing to achieve both social and financial returns.

LEADERSHIP

Expand our leadership in the community and in the field to benefit Cleveland

We seek to partner with community and business leadership, government, and national foundations to boost funding for major initiatives with potential to bring big benefits to Clevelanders, particularly highly innovative models of philanthropy. We will enhance our already-strong leadership in the community foundation field through our active involvement in key issues.

ORGANIZATION

Strengthen our organization by building a high-performing culture and by upgrading systems to support the foundation of the future

We are committed to investing in our people, with improved technology, training, and career development. We will integrate our values throughout the organization, instill teamwork among all, encourage and benefit from diversity, and ensure appropriate staffing to reach our strategic goals.

CENTENNIAL

Celebrate our centennial and position the Cleveland Foundation for the next century

We will commemorate the Cleveland Foundation and its rich history, celebrate the birth and birthplace of the community foundation movement, and build an even larger community endowment for the greater good of Greater Cleveland, setting the stage for the next century.



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