

# CONNECTING + THE COMMUNITY



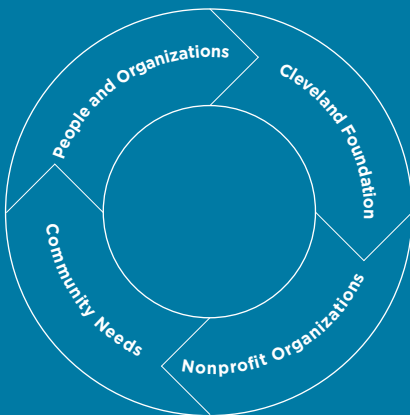
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The Cleveland Foundation Report to the Community 2012

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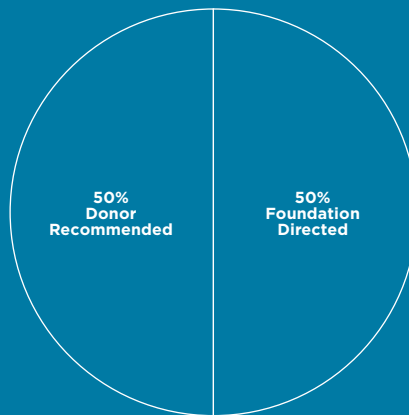
# Who We Are

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.



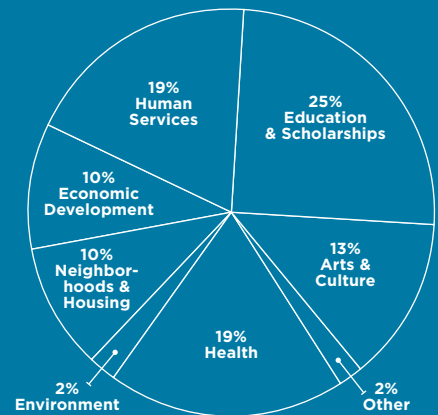
## How You Help Our Community

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.

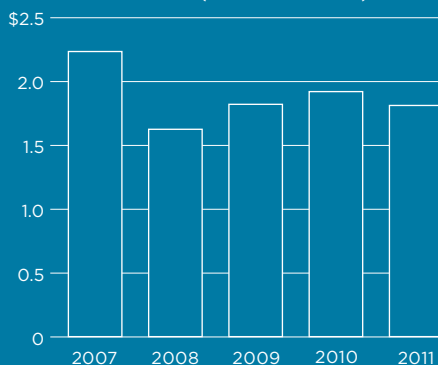


## Where Your Dollars Go

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.

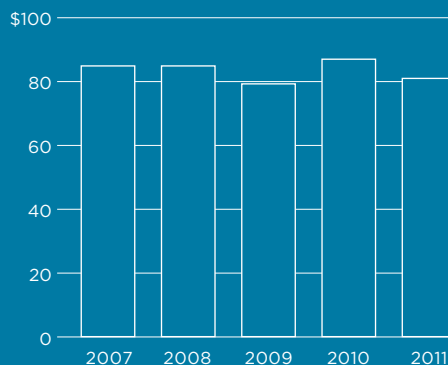
### Endowment

Total Assets (dollars in billions)



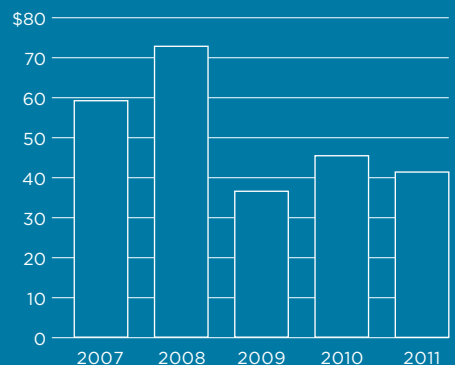
### Grantmaking

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.

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

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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.

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### **The benevolence of our donors inspires us**

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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.



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## Our open door invites nonprofits to bring us their needs

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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.

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## Donor dollars and community partners make innovation possible

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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](http://www.ClevelandFoundation.org/ReportToCommunity12).

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## Thank you and welcome to leaders who make a difference

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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.

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

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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 P. Bolton*

**Ronald B. Richard**  
President & CEO

**Charles P. Bolton**  
Chairman of the Board

October 2012



## MARIBETH+REGIONAL TRANSIT AUTHORITY

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"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.

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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*

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#### **Institutional leaders anchor our team**

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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.

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#### **Economic inclusion leaves no one behind**

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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.

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#### **Transit-oriented projects are gateways**

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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.

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#### **We're building community together**

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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

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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.'"

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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.

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#### **Assured of more autonomy, new schools pioneer new approaches**

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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.

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#### **A smart strategy can secure a better future**

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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.

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#### Our vision: a deeper microlending pool

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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 micro-finance 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.

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#### Our grantees create jobs locally and regionally

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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.

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#### Together, we're building a biomedical cluster

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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.

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#### **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.

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#### **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.

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#### **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.

# ARTS

If you view the

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

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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.

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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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James and Joni Marra		Gregory F. and Jodi Perlman	Sogg Foundation	
Cynthia C. Marschner		Stephen and Felicia Perry	Frank U. Sowell and Linda A. Jackson Sowell	
Richard G. Marschner		George J. Picha, M.D.	Edward J. and Elizabeth Starr	
Nancy-Clay Marsteller, Ph.D.		Richard W. and Patricia R. Pogue	Billie Howland Steffee	
Herbert R. Martens		Potocsnak Family	Brit and Kate Stenson	
Joel D. Marx Family		PricewaterhouseCoopers	Matthew and Elizabeth Stewart	
Elizabeth B. Mastrangelo, Ph.D.		Max R. and Linda J. Proffitt	Lael Stone, M.D.	
Ellen L. Mastrangelo		Victor A. and Phyllis E. Ptak	Robert D. and Juanita C. Storey	
Lisa B. Mastrangelo		Jim Puffenberger	Judith D. and G. Walter Stuelpe Jr.	
Mark E. Mastrangelo		<b>R</b>	Frank and Barbara Sullivan	
Elizabeth McBride		Linda Rae and Andrew Hertz, M.D.	Thomas and Sandy Sullivan	
Timothy F. and Alice B. McCarthy		P. Eric and Carol A. Ralston	Thomas C. Sullivan Jr.	
Diane O. McDaniel		Clara Rankin	Alice and Béla Szigethy	
Thornton D.* and Penny P. McDonough		<b>T</b>		
James McGlamery, Ph.D.		Frances P. Taft		
Lawrence E. and Sheila Rowan McHale		Shirley A. Taussig		
		Dudley J. Taw		
		Mike and Jane Tellor		
		Neil L. and Kathy Thompson		

# LEGACY SOCIETY

Members of the Legacy Society have planned a future gift to their community through a bequest, trust, pooled income fund, life insurance policy, charitable gift annuity, or charitable remainder trust.

A		Kevin Ellison Doris Anita Evans, M.D.	Elizabeth W.* and William M. Jones L. Morris Jones, M.D. and Adrienne L. Jones, Ph.D. Nancy and Donald Junglas, M.D. Anne C. Juster	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. Cucchiaara Florence K.Z. Pollack Caroline Brewer Goff Prentiss
B	anonymous (11) Jonathan D. Adams and Pamela T. Conover, M.D. Stanley I. and Hope S. Adelstein Peter and Jane Anagnostos Lois M. Applegate	Jean E. Fairfax Charles J. Farro Lauren Rich Fine Scott Fine Richard and Susan Fink Fitzgerald Family C. Henry and Caryn Foltz Jeanne Freels	Patricia Lynn Kalbac Joel and Donna Kaminsky Willis E. Kelley William and Barbara Kirsch Malvina and Gilles Klopman, Ph.D. Norman F. and Sandra L. Klopp August and Olga Koenig Stewart A. and Donna M. Kohl Wilma L. Kohn, Ph.D. Martin R. Kolb and Sandra I. Kiely Kolb June R. Kosich Philip L. and Pauline Krug	Stuart Reader William Hughes Roberts Marjorie A. Rott James L. Ryhal Jr.
C	Dolores J. and Lawrence J. Badar Marvelous Ray Baker Fred J. and Elizabeth S.* Ball Mal and Lea Bank D. Robert* and Kathleen L. Barber, Ph.D. Ronald C. Barnes Hanna H. and James T. Bartlett Richard and Mary Ellen Batyko Teresa Metcalf Beasley Jeanie and George Belhobek Cynthia Bernheimer Michelle Blackford Dennis and Madeline Block Caprice H. Bragg Arthur V.N. Brooks Lenore V. Buford, Ph.D. Joyce A. Burch George W.* and Helen Boggis Burdg Robert and Virginia* Burkhardt Anna Ruth Bussian	John Gabel Garapic Family Fund Albert I. and Norma C. Geller Robert M. and Barbara Ginn Robert and JoAnn Glick Gerald Lieber Goodman Joseph T. and Karen A. Gorman Julianne Goss Christine Gregory Sally K. Griswold Michael J. Grusenmeyer, M.D. Barbara Gustafson Marie Gustavsson-Monago	Tom H. and Samie Lang Charles L. and Josephine Robson Leamy Ndeda N. Letson Eleanor M.* and Wayne H.* Lewis Jr. G. Russell and Connie Lincoln Kenneth A. Linstruth, M.D. Charles S. Lurie Thomas E. and Patricia A. Lusk Elsie C. Lutman	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
D	Manny and Carmella Calta Harry and Marjorie M. Carlson Mary C. Carter Kathleen A. Cerveny John and Patricia Chapman Kelly Chapman Michael A. and Susan K. Clegg C. Linda Cooper Susan and Richard Coyne John Cridland David B. and Elizabeth L. Crow Pitt A. and Sally Curtiss	Rev. Edward T. Haggins Mary Louise and Richard Hahn Phyllis A. Hall Awilda Hamilton Mary W. and Clive R. Hamlin, M.D. Ambassador Holsey Gates Handyside Randolph M. Hansen Teri A. Hansen Richard Callow Hartung Mary Jane and Shattuck* Hartwell, M.D. Beverly G. and Albert M.* Higley Jr. Edith Fellingner Hirsch Sandra L. Hoeffler Michael J. and Suzanne I. Hoffmann Ruth R. Holm Ronald D. Holman Sr. Justin Horton Samuel J. and Eva H. Horwitz P. Clark Hungerford Kathleene Huntley	Joseph J.* and Roseann Manley Franklin F. Martin Aline G. Masek Melodie Mayberry-Stewart, Ph.D. Susan A. Miller, Ph.D. Donald L. and Merle C. Milmine Steven and Dolly Minter William A. and Margaret N. Mitchell Ginger F. Mlakar Diane Moffett Helen M. Moise John B. Moore Ann Jones Morgan Patrick and Amy Mullin	Charles H. Teare Joseph H. and Ellen B. Thomas
E	Manohar L. and Chandra Daga Beth Darmstadter Philip Dawson Donna Steen Dettner Marian Marrs Doershuk and Carl F. Doershuk, M.D. Henry C. and Mary M. Doll Adela D. Dolney Ruth A. Dreger	Katherine and Jonathan* Ingersoll	John F. O'Brien	Robert F. and Beverly M. Vail David and Ellen Van Arsdale Mary and Cedomil* Vugrincic, M.D.
F	Terri Bradford Eason Stephen M. Egert	Jerry and Martha Jarrett Kevin K. Johnson and Connie Hill-Johnson	Stanley C. and Elaine C. Pace Margaret Patch	Patrick M. Zohn Malcolm and Helene* Zucker Angelica Zylowski

# FUNDS

As of December 31, 2011

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## New Named Funds and Planned Gifts

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**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

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## New Donor-Advised Funds

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**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

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## New Scholarship Funds

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**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

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## New Organizational Endowment Funds

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**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

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## Supporting Organizations and Committee-Advised Funds

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(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.

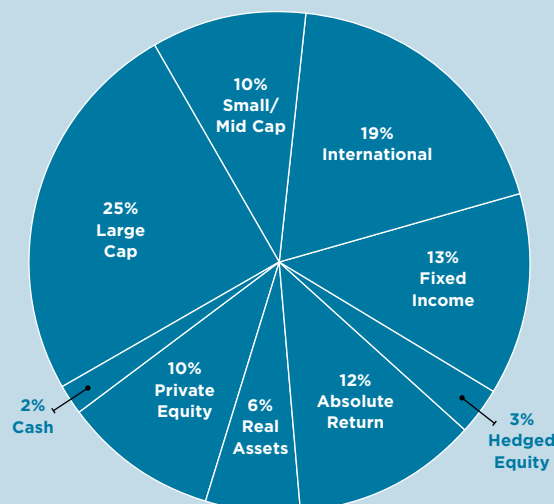
Diversification and use of best-in-class investment managers are keys to meeting our long-term objectives. Going forward, the majority of our portfolio will be exposed to equity markets, but we will use hedged equity, fixed income, and absolute-return investments to minimize volatility and real assets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

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## 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

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

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## Investment Options

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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](http://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

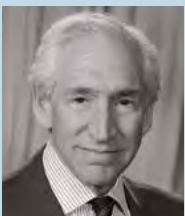
*Appointed 2012 by the  
Board of Directors*



**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. Cerveny**  
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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Cleveland, Ohio 44115  
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[www.ClevelandFoundation.org](http://www.ClevelandFoundation.org)