



Autumn 2011

News for donors and friends of the Cleveland Foundation



## A CENTURY OF HELPING YOUNG WOMEN IN CLEVELAND

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Photo courtesy of Western Reserve Historical Society

The Florence Crittenton Home opened in 1911 on Eddy Road in Cleveland and was staffed with nurses, a visiting physician, and a matron who managed daily activities.

**For 100 years, adolescent girls and young women in Greater Cleveland have benefited from services provided in the name of Florence Crittenton.**

In the fall of 1911, the Florence Crittenton Home for Unwed Mothers of Cleveland opened as a branch of the national Florence Crittenton Mission, which cared for unwed mothers and their children. The national organization was started by Charles Crittenton, a wealthy New Yorker who was drawn to philanthropy after losing his 4-year-old daughter, Florence, to scarlet fever. By 1914, the home in Cleveland was

one of 73 Florence Crittenton residences in the United States.

As times changed and the stigma often associated with out-of-wedlock pregnancies faded, the need for residential care for unwed mothers declined. Florence Crittenton Services of Greater Cleveland (FCS) evolved from providing residential services for young mothers to operating group homes and shelters for troubled girls in Northeast Ohio.

By the mid-1990s, FCS was at a crossroads. The costs of keeping the residential units were rising, and government

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# DEAR FRIENDS



Terri B. Eason

Dear Friends:

As seasons change and the crisp air of autumn welcomes the cold winds of winter, fond memories of childhood appear: jumping into piles of leaves, warming up by an outdoor fire, and watching for the first snowfall. It also reminds us that the school year is well on its way. Supporting young people in Greater Cleveland continues to be a top priority and key initiative for the Cleveland Foundation. This issue of Giving Voice focuses on youth and social services. Featured are Billie Howland Steffee and John and Margie Wheeler, donors who are true advocates for youth development and social services. In addition, you will learn about the history behind the Florence Crittenton Services Fund and the creative ways it engages youth to make an impact within our community.

On Oct. 4, the Foundation hosted the Frederick Harris Goff & Legacy Societies Leadership Reception. We recognized Billie Howland Steffee with the 2011 Frederick Harris Goff Philanthropic Leadership Award, and John and Margie Wheeler with the 2011 Frederick Harris Goff Philanthropic Service Award. We are humbled and inspired by their great works, and we know you will feel the same way as you read their stories.

Warmest regards,

Terri B. Eason  
Director of Gift Planning

Ginger F. Mlakar  
Director of Donor Relations



Ginger F. Mlakar

## FINANCIAL UPDATE

**After a strong start,** the Cleveland Foundation's financial performance was impacted by a challenging market environment during the third quarter of 2011. At Sept. 30, our assets totaled \$1.75 billion, below the \$1.89 billion at year end, as gifts of \$31 million were offset by grants paid of \$52 million and investment losses of 5.3 percent. Our seven-year returns through Sept. 30 were 5.2 percent, below our target of 8 percent but above the S&P returns of 2.3 percent.

The financial markets faced significant headwinds during the third quarter due to increased volatility caused by "gridlock" in Washington, D.C., the S&P downgrade, lower economic growth assumptions, and continued financial turmoil in Europe. Fortunately, the markets rebounded during October with the S&P returning 10.9

percent, the DJIA returning 9.7 percent, and the MSCI EAFE index for international stocks returning 9.7 percent. Our assets increased to \$1.84 billion at October's end.

We continue to have a well-diversified portfolio. While the S&P was down 13.9 percent, we incurred a loss of 9.1 percent for the foundation overall and 7.8 percent for the Cleveland Foundation Pool. For October, the Cleveland Foundation Pool, in which many donor-advised and organization endowment funds are invested, was up about 5 percent, leaving it in positive territory for the year to date.

The Cleveland Foundation Pool is positioned for a longer-term slow growth environment with our focus on high-quality multinational large cap stocks, conservative emerging markets funds, absolute return and hedged equity investments, and shorter duration fixed income.

# A CENTURY OF HELPING...

CONTINUED FROM PAGE 1...

reimbursements for services were declining. The FCS board decided to discontinue the organization as it had been configured, but to continue its mission by converting the remaining assets, along with a large bequest from an anonymous donor, to a permanent fund at the Cleveland Foundation.



Photo courtesy of Western Reserve Historical Society

After giving birth, many of the young mothers would continue to stay at the Florence Crittenton Home with their babies to reap the “redemptive benefits of motherhood.”

In 1998, the Florence Crittenton Services Fund of the Cleveland Foundation was born and christened, its purpose to “Help young women to grow physically, emotionally, intellectually, and socially in preparation for leading productive and satisfying lives within their communities.”

Creating the donor-advised fund at the Cleveland Foundation made perfect sense to Sharon Martin,

the chairwoman of the Florence Crittenton Services Fund committee.

“What I love about the fund is that it is in perpetuity,” she said. “There will always be impact from the Florence Crittenton fund in the Cleveland area.”

The fund is one of the few community resources in Northeast Ohio dedicated to programs that serve adolescent girls. In its 13 years, the fund has granted almost \$600,000 to programs that help girls navigate the challenges of their formative years often with a special focus on “at risk” populations. Its primary focus is on prevention.

Among the grantees that have benefited from the fund are programs that help girls to learn how to manage stress and confront negative peer pressure, improve their health and prevent teen pregnancy, and develop leadership and literacy skills.

The Crittenton Fund is not only helping at-risk girls in Northeast Ohio to become successful women, it is also engaging the next generation in the importance of philanthropy. Since 2003, the fund has partnered with two local youth philanthropy programs – the John K. Mott Youth Fund Distribution Committee and Hathaway Brown School’s GROW Foundation – to help review funding requests and make grants to programs that fit the Crittenton’s funding criteria.

## MORE ABOUT DONOR-ADVISED FUNDS

The Florence Crittenton Services Fund is one of more than 400 donor-advised funds managed by the Cleveland Foundation. These funds allow individuals, families, and other groups to explore philanthropy and advise where the grants go.

Starting a donor-advised fund requires a contribution of cash, securities, or other property valued at a minimum of \$10,000. Donors recommend grant disbursements to support nonprofit organizations according to their interests and values.

Contributions to the fund are fully tax-deductible, and the deduction can be carried forward over as many as five years.

The staff at the Cleveland Foundation administers and invests the assets of the fund, files tax returns, and assists in making grant recommendations and researching prospective grant recipients that match the donor’s interests.

# FREDERICK HARRIS GOFF & LEGACY SOCIETIES

*Once every two years, we host a Frederick Harris Goff & Legacy Societies Leadership recognition event. It is one way to thank our donors for the support and trust they have placed in our foundation, our mission, and the causes we all care deeply about.*

*The event also provides an opportunity to offer special awards and recognition, named in honor of our founder, to donors whose dedication to the community and belief in the power of philanthropy have made and will continue to make a difference in the lives of Greater Clevelanders.*

*This year, at the Frederick Harris Goff & Legacy Societies Leadership reception on October 4, we were pleased to honor three people whose lives inspire us all.*

## Frederick Harris Goff Philanthropic Leadership Award



Photo courtesy of Robert Muller

Billie Howland Steffee's love of animals is apparent at her home at Craighead Farm in Geauga County and in many of her philanthropic endeavors.

**The fund that Billie Howland Steffee** created bears her name, but it also could be known simply as "The Fearless Fund."

"We've done some grants that were really quite risky," said the fund's benefactor. "We never shy away from subjects that not a lot of people want to tackle. The wrong road for someone else might be just the right road for us."

Most often, the road leads to helping children of all ages.

"We've done a little of this and a little of that, but we've basically centered on children and the special challenges that they present not only to themselves, but to their parents and the community. Children get to be older children very quickly," she said.

"A little bit of this and a little of that" comes from a lot of financial support. Billie began the fund in 1998 with more than \$9 million. As of June of this year, grants totaling more than \$7 million had been made to a wide range of organizations helping

children of all ages and other causes. The fund rolls along with more than \$5 million in reserve.

"In the beginning, we were a supporting organization that wasn't the least bit afraid to dip into principal if we needed to do that," Billie said.

There have been grants to assist children with autism, to further childhood development, to fight the influence of gangs on urban youth, and to create supportive homes for adults with developmental disabilities.

The Innovative Independent Living Project received the fund's enthusiastic support. The project, administered by LEAP (Linking Employment, Abilities and Potential), uses technology such as video monitoring, customized training, and support to allow adults with developmental disabilities to live on their own.

"It just makes your heart sing because, what a worry for parents who are older, who are facing retirement or are retired, who have adult children who absolutely cannot take care of themselves," Billie said. "And then what are you

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## Frederick Harris Goff Philanthropic Service Award

### MORE ABOUT SUPPORTING ORGANIZATIONS

*The Billie Howland Steffee Family Fund was established in 1998 as a supporting organization of the Cleveland Foundation.*

*Families, corporations, individuals, and even private foundations have formed supporting organizations of the Cleveland Foundation as a way to demonstrate their philanthropic interests. A minimum of \$5 million is needed to create such a fund.*

*A supporting organization is a separate nonprofit entity that operates in connection with a public foundation and supports its mission. The affiliation means that a supporting organization uses the professional services of the public foundation, including staff assistance and guidance with grantmaking, investing, and administration services. Because of this close connection, a supporting organization is treated, for tax purposes, as a public charity and is not subjected to excise taxes, minimum payout requirements, and regulations concerning excess business holdings.*

*Each supporting organization has its own board of directors that determines grant and investment priorities, with the public foundation appointing the majority of board members.*



Photo courtesy of Robert Muller

John and Margie Wheeler's philanthropic service is driven by different passions and a shared sense of community.

**For John and Margie Wheeler,** service to the community begins with passion.

"It's very important to give back," said John. "The best way to do that is to do something that really excites you."

Social causes have driven Margie Wheeler as she has marched for civil rights; stood by rape victims; advocated for the uninsured; and supported children with autism and those with mental illness, to name just a few examples.

John Wheeler is motivated by the opportunity to spur economic development and restore vitality in Northeast Ohio. He likes to focus on projects that are transformational.

Transformational. It's a great word to describe John and Margie Wheeler's commitment to the region.

"All that really counts in life is making a difference," John said. "There are those little niches in life where you can really make a difference."

Those niches can be filled with time, with talent, and with philanthropy, as the Wheelers have shown.

Margie's niche, her commitment to human services, was handed down from generation to generation like a cherished heirloom. Her grandmother was active in the Maternal Health Association, a predecessor of Planned Parenthood of Greater Cleveland. Her father was involved in local nonprofits and instilled in his children the importance of giving back.

"For me, it was watching him," Margie said. "I think he really embraced all people."

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# Refresh

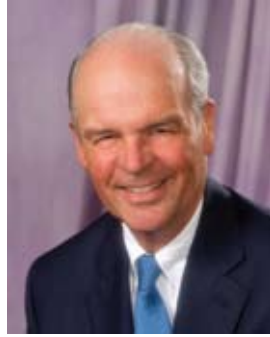
## Meet new board chair and member

**We offer congratulations and best wishes to the new** chair of the Cleveland Foundation's board of directors and its newest member.

This spring, the foundation's board elected Charles P. Bolton as the 19th chair in the organization's 97-year history.

Bolton is a private investor and a former state senator. He is a member of the boards of the City Club Foundation, Cleveland Museum of Art, the Cleveland Orchestra's Musical Arts Association, the Payne Fund, and the Kelvin and Eleanor Smith Foundation. He is an emeritus trustee of Case Western Reserve University and a life trustee of Hawken School after serving both institutions as chairman. Bolton has been a member of the Cleveland Foundation board since 2004.

"Charlie Bolton has been an ardent supporter of the foundation and its initiatives, both through his highly engaged work with the board and as an individual and philanthropist," said Ronald B. Richard, president and CEO of the Cleveland Foundation.



Charles P. Bolton

Bolton succeeds David Goldberg, principal of Edgerton Investments, as board chair. Goldberg, who served as chair for three years, will remain on the board until his 10-year term expires in March 2012.

Also this spring, Beth Rankin was appointed to a five-year term on the foundation's board. She was past co-president and is current co-chair of the board for the Cleveland Play House, where her involvement includes annual and capital fundraising, facilities location review, strategic planning, and development of the agreement with Case Western Reserve University's Master of Fine Arts program. She also serves on the executive committee of Town Hall of Cleveland and is a past member of the board of Hathaway Brown and St. Paul's School for Boys in Baltimore.



Beth Rankin

The board of directors governs the foundation, establishes policy, sets priorities, and makes final grant decisions. All members are unpaid volunteers serving staggered five-year terms, for a maximum of 10 years.

## PHILANTHROPIC LEADERSHIP AWARD... CONTINUED FROM PAGE 4

going to do? That's one of the biggest worries."

Billie operates Craighead Farm in Novelty, only the fourth property owner since the home was built in 1837. She raises horses there and takes great pride in them.

She combines her love of animals in many of the philanthropic projects she supports, including the Sarah Allison Steffee Center for Zoological Medicine at Cleveland Metroparks Zoo that carries the name of her late daughter.

Hiram House Camp's Summer Farmstead program gives children the opportunity to learn about barnyard animals and sustainable agriculture. It benefited from

a grant to build Double H Ranch, a 1,200 square-foot structure housing young farm animals and instructional space for campers and youth groups.

The Fieldstone Farm Therapeutic Riding Center in Bainbridge Township started with one horse and an idea. It's now one of the biggest facilities of its kind in the country, providing horse-related programs for people of all ages with disabilities.

"Some of those children, when they're up on their own horse, it's the first time they've looked an adult in the eye or looked down at an adult," Billie said. "What an unbelievable sense of accomplishment."

# NEW FUNDS AND DONORS

**The foundation appreciates and recognizes the following funds and donors:**

(June 1, 2011, thru August 31, 2011)

## **New Funds**

Cavaliers Youth Fund  
William T. and Beverly B. Dahms Fund  
Timothy and Pamela Desanzo Family Fund  
Geis-Saint Stanislaus Preservation Fund  
Dutch Harley East Cleveland Townsend Cemetery  
Tree Fund  
Maureen Kennedy Berg Scholarship Fund  
Virginia Marti College Foundation Fund  
E.J. Rothman Charitable Gift Fund  
Ludvik and Mildred Rychtera Sokol Greater  
Cleveland Czech Museum Fund  
Albert S. Terry Fund

## **Planned Gifts**

Anonymous (6)  
Mr. and Mrs. Richard F. Coyne  
Ginger F. Mlakar  
Robert Quail

## **New Goff Society Members**

*Members of the Goff Society have established a charitable fund or made cumulative gifts of \$10,000 or more.*

Michael P. Bergeron Foundation  
Kevin D. Cooper, M.D.  
John J. and Bonnie L. Dusek  
Marley Blue Lewis

## **New Legacy Society Members**

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

Jeanie and George Belhobek  
Ginger F. Mlakar

## **In Memory of**

Grace Chamberlain's birthday  
William F. Cody  
Renee Drefahl  
Marcia LaRichie  
Harold McLaughlin  
Terry Speth

## **In Honor of**

Service of Caprice Bragg as Chair of the AdNet Steering Committee  
Councilman Joe Cimperman  
Debby Conlon Knappe  
Steve Drefahl  
Marriage of Bruce Griffin and Desiree Roman  
Jacques and Gunilla Gustavsson's anniversary  
Ben and Ethel Kornhauser  
Gail Long's birthday  
Mother's and Father's Days  
Delores Turner  
Councilman Jay Westbrook

## YEAR-END DATES TO REMEMBER

*As you consider year-end gifts and grants, please remember these dates:*

### **Grants**

**Friday, December 16, 2011**

Kindly submit your recommendations for 2011 grants by this date.

### **Gifts**

**Friday, December 30, 2011**

This is the last business day of the year to make a charitable gift. If you are planning to make a gift of publicly traded stock or mutual funds, please start early.



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## **PHILANTHROPIC SERVICE AWARD...**

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He also insisted that his daughters make their education a priority. "He told us, 'You cannot marry until you at least have a master's degree,' " Margie recalled. She got hers in social work and, along the way, marched with civil rights leader Jesse Jackson.

John, a former Calfee Halter partner, has served on the Allegheny College board and now is senior vice president of administration at Case Western Reserve University. He is finishing his eighth and final year as mayor of Hunting Valley. He was instrumental in resuscitating the Union Club and broadening its membership to include women, minorities, and young professionals.

Margie implores others to get out of their cocoons, to "jump into another area, meet people you wouldn't necessarily meet, hear what they say, hear different voices."

"Find your passion. You get so much more in return," she said. "Whatever you give, whether it is time or financially, it comes back."

As important as it is to give, the Wheelers said, it's equally important to pass the torch to the next generation.

"After a while, you stop asking questions. You're not going to learn much more," Margie said. "That's when it's time to let someone else learn. There are a lot of talented people out there who want to learn and give."