

# GIFT *of* GIVING

NEWS FOR DONORS AND FRIENDS OF THE CLEVELAND FOUNDATION



2016 Cleveland Indians



Indians Manager Terry Francona



## + A HOME RUN FOR KIDS:

CLEVELAND INDIANS AND COMMUNITY RALLY TOGETHER FOR THE LARRY DOBY YOUTH FUND

**INSIDE:** *Organizational Funds Strengthen Our Community for the Future*



Welcome to our spring issue of *Gift of Giving*, the magazine for donors and friends of the Cleveland Foundation.

Our cover story on The Larry Doby Youth Fund is one of my favorites as we recognize the Cleveland Indians for their effort in taking a swing at youth violence through a \$1 million fund they established in partnership with our philanthropic team. This story continues to play out this spring as we witness the team's first grants and the true impact of their generosity among young fans in our community.

Speaking of game-changers, on the opposite page, we bring you a Q&A with Stephen McHale who is known for his serial entrepreneurship, particularly co-founding Explorys, which is now a key element in IBM's Watson Health division. Amid his busy schedule, Steve has established a donor advised fund with the Cleveland Foundation and now counts philanthropy among his many rewarding pursuits.

In this issue, we also highlight two leaders on our grantmaking team - India Pierce Lee and Lillian Kuri - who were respectively elevated to Senior Vice President, Program, and to Vice President, Strategic Grantmaking, Arts & Urban Design Initiatives. Their expertise in neighborhood revitalization, urban planning and the arts is destined to take the foundation - and our community - to new heights.

As we look at our 2017 calendars, there are an exciting number of events and initiatives lined up for our donors, including the Cleveland Foundation Annual Meeting presented by KeyBank on May 10 featuring the Robert D. Gries Keynote Lecture by AOL co-founder, author and philanthropist Steve Case. We hope you can join us to hear Mr. Case's views on technology as a transformative force in society, business and public policy and the frontiers that lie ahead.

As we celebrate the foundation's 103rd year of impact, we thank you for seeing the potential in so many promising areas around us. It's the generosity of our donors that fuels so many of the programs we are proud of, and we stand ready to serve you.

Warm regards,

Kaye Ridolfi, Senior Vice President, Advancement



5 Smart Ways to Maximize Donor Advised Funds

Donor advised funds are a universally popular tool in charitable giving - the Cleveland Foundation services more than 550! With careful planning, a donor advised fund can bring great tax savings and offer flexibility and the benefit of centralizing charitable dollars. Some simple strategies can help donors maximize the impact of their funds:

- 1. Choose the Right Partner: The Cleveland Foundation offers dedicated advisors who understand community needs and welcome the opportunity to connect donors to the most effective nonprofits. Donor consultations are available throughout the year to "check up" on a fund and discuss grantmaking opportunities.
2. Involve Family: The foundation can customize giving plans and help families create missions and visions for their fund. Family members can be designated as current or successor advisors to a fund.
3. Maximize Flexibility: Cleveland Foundation donor advised funds accept a wide variety of assets and gifts from others. Donors benefit from an immediate tax deduction, and fund holders can make grantmaking decisions at any time. The Cleveland Foundation can also help convert a private foundation into a donor advised fund so donors are free of administrative duties and can concentrate on the joy of philanthropy.
4. Build Connections: The Cleveland Foundation invites its fund holders to educational and networking opportunities throughout the year. Connecting with other donors and nonprofits doing innovative work can make your philanthropic experience all the more meaningful.
5. Leave a Legacy: It's possible for a Cleveland Foundation fund to remain part of an estate gift so that donors can support their favorite organizations in perpetuity.

Donor-advised funds are quick and easy to establish! Contact a member of the Cleveland Foundation Advancement team via 877-554-5054 to learn more.

Why I Give:

Stephen McHale on Technology, Society and Philanthropy

Why do so many people choose to give through the Cleveland Foundation? The reasons and interests are as unique as the story of the donor. Proud Northeast Ohioan Stephen McHale established a donor-advised fund with the Cleveland Foundation in 2015, although he is better known for his role as co-founder and CEO of Explorys, which was formed in partnership with Cleveland Clinic and acquired in 2015 by IBM as a founding element of the new Watson Health division. Watson is a highly advertised computer system capable of answering questions posed in natural language. In this issue, we'll ask McHale a few philanthropic queries of our own:

Entrepreneurs use big ideas to help drive change. How has that kind of thinking helped shape your philanthropy?

I look at many of the societal issues that we are faced with today through a bit of a naive lens. I consider how we can approach these opportunities in an innovative and disruptive way. I have a belief that our country and local governments are ready for meaningful change and some different approaches to the issues that are upon us.

Why does philanthropy have an important role in the future of society?

In many cases, philanthropy is a critical bridge between the public and private sector. As wealth is developed in our free market society, it is clear that both the talent and dollars in the private sector are needed to improve the situation of struggling populations in our country. I believe that we will see much more support from those who have developed wealth going forward.

Why do you regard Cleveland as a special place for entrepreneurship?

Cleveland has led many fields in the past. As we moved through the industrial revolution, Cleveland dominated in the steel and manufacturing industries. I see so much talent here, and our cost of living is far better than on the East and West Coasts.

Tell us about why you partnered with the Cleveland Foundation for your giving?

Two reasons. The Cleveland Foundation has a stellar reputation of stewardship and thought leadership. That combined with the opportunity to network with other local philanthropists were the driving factors.

Tell us what causes you care about?

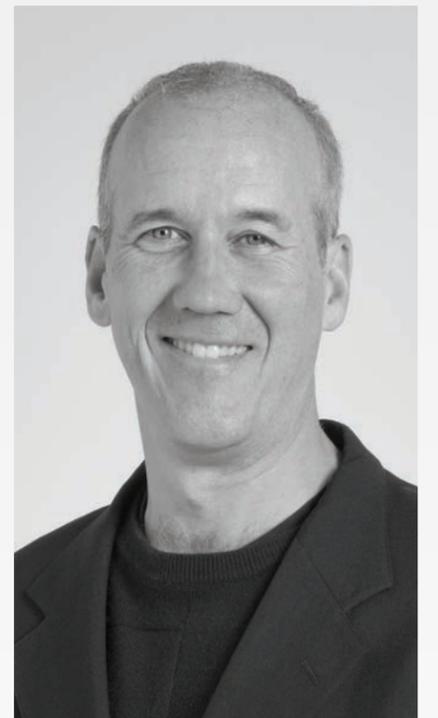
My primary interests are in supporting organizations focused on the most pressing of needs, such as our education system and public infrastructure and services.

How do you hope to involve your family in philanthropy?

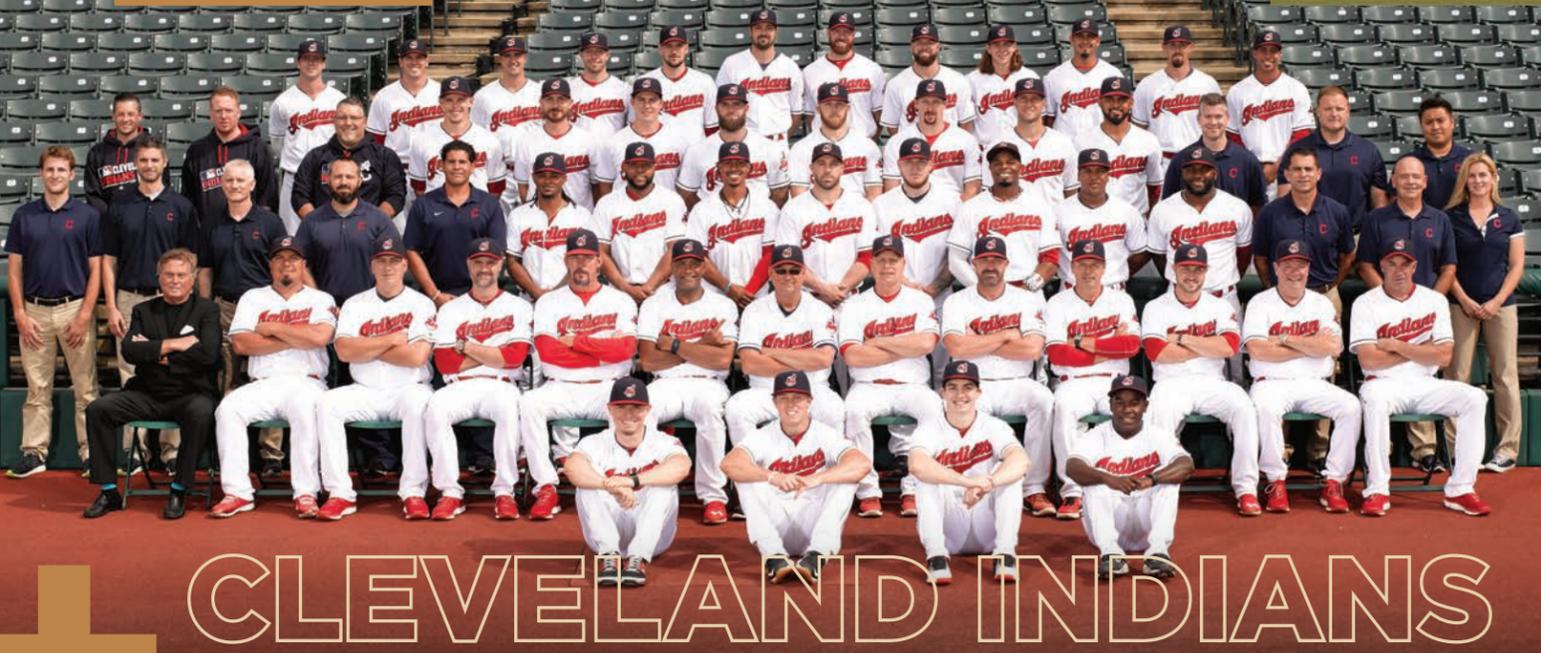
My daughters, 17 and 22, are actively involved already. They have diverse interests, but are able to come to consensus most of the time. Right now, we are all aligned on education, which has been the direction of our initial giving.

What has been the most rewarding part of your philanthropy?

While it is early for me, I appreciate the community reputation of the Cleveland Foundation. Nonprofits recognize when I'm fulfilling my commitment from a donor advised fund. Additionally, I have met several very exciting donors via the foundation's social events that facilitate networking.



Stephen McHale is co-founder and CEO of Explorys, which was acquired by IBM as a founding element of the new Watson Health division, a "partnership between humanity and technology." McHale was instrumental in keeping division offices in Cleveland after the sale.



# CLEVELAND INDIANS RALLY TOGETHER FOR LOCAL YOUTH

As the Cleveland Indians prepared for Opening Day, something other than sliders, doubles and tag outs was on their mind: taking a swing at youth violence. In the fall, the team made headlines when it mobilized for a tremendous post-season and simultaneously launched The Larry Doby Youth Fund of the Cleveland Foundation for underserved local youth. The fund brightened fans' hearts and generated buzz clear through the World Series. In April, the team announced 18 nonprofits, listed at right, that will collectively receive \$1 million in grant awards from the fund for work that is making a tangible impact in young lives.

"We are very fortunate to be a part of Major League Baseball," Indians Manager Terry Francona said, "and we accept the social responsibility that comes with that - to use our resources to directly make an impact on the underserved youth of our community, and to make our community better."

Francona had reflected on the national conversation around community-police relations, particularly in our nation's urban centers, and felt compelled to offer real solutions. With so many headline incidents involving minority youth, he turned to the African-American players on the team for perspective and advice. Then he challenged the team to consider their fortunate position in the league and to make a difference in the city that cheers them on. In less than a week, the entire 2016 roster and all coaches, support staff and ownership had pooled more than \$1 million to support nonprofits that provide youth violence prevention education and outreach in the City of Cleveland.

"It was probably the most proud I've ever been in my baseball career," Francona said at The City Club of Cleveland on Jan. 27. "We couldn't do this with any other team. We had 100 percent participation. It was incredible."

The idea arose to name the effort in honor of Larry Doby, who was the first African-American player in the American League and the second to break the professional baseball color barrier - which he did on the Indians roster in 1947.

"Our family is honored to be connected with this very important work," Larry Doby Jr. said when the fund was announced.

Doby Sr. was a seven-time All-Star, the first African-American to hit a home run in the World Series, and the first African-American to lead the majors in home runs, which occurred in 1952.

Doby is quoted as having said: "Kids are our future, and we hope baseball has given them some idea of what it is to live together and how we can get along, whether you be black or white."

Doby became the second African-American to manage a major league team - the Chicago White Sox - and took his rightful place in the Baseball Hall of Fame in 1998.

"He endured many unfair hardships and challenges, and handled everything with the professionalism and grace that defined him," Francona said about the legendary centerfielder. "It is in Mr. Doby's spirit we have created The Larry Doby Youth Fund."

The Indians turned to the Cleveland Foundation for administrative support along with investing and grantmaking expertise.

**"Community engagement is what makes the Cleveland Indians a special organization" - Paul Dolan**

"Larry Doby is an icon in our community, and the Cleveland Indians are true champions for continuing his civic legacy at all levels of the organization," said Ronn Richard, President and CEO of the Cleveland Foundation. "By giving back to Cleveland and serving their youngest fans, the Cleveland Indians and their uniformed personnel in this instance demonstrate once again why we are proud to root for the home team."

When The Larry Doby Youth Fund was announced, thousands of fans celebrated the team on social media or made donations through the Cleveland Foundation's online and text-to-give platforms.

"Northeast Ohio has a rich history of giving and caring for those who are underserved," Francona said. "The community's response to The Larry Doby Fund is another example of that spirit of giving. We truly appreciate our fans' support of the fund."

The Cleveland Foundation helped manage the nonprofit grant application process and reviewed the proposals with a committee of Cleveland Indians ownership, management and players.

"Community engagement is what makes the Cleveland Indians a special organization," said Paul Dolan, Cleveland Indians owner and vice chairman of the Cleveland Foundation board of directors. "We have a great roster and staff who care about making the community better, and I am excited to see how our fund will support those agencies and organizations that are already making a tremendous difference."

For the Indians, The Larry Doby Youth Fund was a logical next step after years of support for Cleveland youth. The franchise has supported youth baseball and softball programs in partnership with the Cleveland Metropolitan School District

and the Cleveland Baseball Federation and has also supported a variety of enrichment programs at the Boys & Girls Clubs of Cleveland.

"We were thrilled to work with the team and help them achieve their philanthropic goals," said Kaye Ridolfi, Cleveland Foundation Senior Vice President of Advancement. "Their athletic success has already taken our city to new heights, and everyone is excited to see how their generosity makes an impact in the future."



▲ The Larry Doby Statue outside Progressive Field

For more information on the fund, visit: [www.ClevelandFoundation.org/LarryDobyYouthFund](http://www.ClevelandFoundation.org/LarryDobyYouthFund).

## Announcing \$1 Million in Grants from The Larry Doby Youth Fund

**America SCORES Cleveland:** After school soccer and journal writing

**Baseball Heritage Museum:** League Park Baseball History youth programming

**Big Brothers Big Sisters of Greater Cleveland - Bigs in Blue:** Mentoring relationships with 4th District police and youth

**Boys & Girls Clubs of Cleveland:** Building Bridges between youth and law enforcement

**Cleveland Peacemakers Alliance:** Mentoring relationships for youth with police officers

**Cleveland Police Athletic League:** Activities that engage police officers and youth

**College Now Greater Cleveland Inc.:** College and career advising program for 600 John Adams High School students

**East End Neighborhood House Association:** My Sister, My Brother - afterschool program for 7th and 8th graders

**Esperanza Inc.:** Mentoring programs

**Friends of Breakthrough Schools:** Support for 11 high performing charter schools

**Golden Ciphers:** Out of school time programming

**Lutheran Metropolitan Ministry:** Health and crime prevention education programs

**The NewBridge Cleveland Center for Arts & Technology:** After school youth arts programming

**OhioGuidestone:** Youth and police development programming

**Partnership For A Safer Cleveland:** IMPACT 25 Youth Commission

**Providence House Inc.:** Emergency shelter for children in crisis

**University Settlement Inc.:** SmartY's program

**Youth Opportunities Unlimited:** Summer job program for youth

## New Senior Leadership Appointments in Grantmaking

The Cleveland Foundation is celebrating the promotion of two senior leaders on the Program team. India Pierce Lee, Program Director for Community Development, has been promoted to Senior Vice President, Program. In this role, Pierce Lee will lead the Cleveland Foundation's grantmaking team, working with the board, staff and community leaders to define Greater Cleveland's critical needs and leverage resources to address them.

"India is the ultimate ambassador for Greater Cleveland. She is beloved by our board, staff and our community, and that's because she understands the needs of our residents, the opportunities in our neighborhoods, and the best path forward to expand Cleveland's renaissance so that everyone benefits," said Ronn Richard, Cleveland Foundation President and CEO. "The sky's the limit with India, and I can't imagine anyone better qualified to ensure we continue the foundation's tradition of grantmaking excellence."

Lillian Kuri, Program Director for Arts & Urban Design, has been promoted to Vice President, Strategic Grantmaking, Arts & Urban Design. Kuri will continue to manage her grantmaking portfolio as well as develop new initiatives. She manages Creative Fusion, the foundation's international artist residency program and is also leading the foundation's new arts mastery initiative to bring year-round, rigorous programs in dance, theater, music and visual arts to thousands of underserved children. Pierce Lee and Kuri bring more than 20 years of combined experience at the Cleveland Foundation to their new roles.



▲ Lillian A. Kuri, Vice President, Strategic Grantmaking, Arts & Urban Design Initiatives, and India Pierce Lee, Senior Vice President, Program.

## Scene & Heard

In recognition of their invaluable partnership with the foundation and to celebrate the holiday season, nearly 200 Cleveland Foundation donors and friends gathered December 13 at the Hilton Cleveland Downtown.



▲ Rev. Hilton Smith and Marsha Morrell-Smith



▲ Imani and Belva Denmark Tibbs



▲ Ann and Lou Frangos

## Organizational Funds Strengthen Our Community for the Future

Organizational Fund Partner Appreciation Week is May 7-13



▲ Organizational Fund Partners can expect additional recognition this year as part of the Cleveland Foundation's 2017 appreciation initiative, which kicked off at a reception in February.

On February 15, the Cleveland Foundation announced enhanced services for its organizational fund partners and that it will celebrate Organizational Fund Partner Appreciation Week May 7-13 to acknowledge and thank the more than 200 nonprofits that have established funds with the foundation. This initiative is a way for the foundation to showcase our organizational partners, their missions and their funds among current foundation donors, friends and the community. The initiative will create an opportunity for these organizations to capitalize on the foundation's outreach and, in turn, raise dollars for their own funds. These "organizational funds," as they are called, strengthen nonprofits - and our community - for the future when a nonprofit sets aside a charitable nest egg and then uses the investment earnings to help fund the organization's mission.

"Building community endowment is an important part of the foundation's own mission, so we want to recognize and thank the organizations that have also embraced this responsible strategy" said Kaye Ridolfi, Cleveland Foundation Senior Vice President of Advancement. "In the hardest of times, it's a safety net, and in the best times, an organizational fund can be a catalytic resource for new projects and programs that would not be possible otherwise."

Forward-thinking organizations have discovered the wisdom in establishing these stable, predictable sources of income earmarked for their long-term mission. The foundation handles the investment management and oversight on behalf of its organizational fund partners, and all gifts to a fund are tax deductible at the highest levels. By focusing on the administrative services required for each fund, the foundation allows its nonprofit partners to focus on their mission of service in our community.

## Organizational Fund Partner Benefits

The Cleveland Foundation offers many advantages in holding and managing a charitable organization's fund, including:

- Access to large investment pools with low fees and proven strong investment stewardship
- An assigned donor relations advisor providing customized services, including access to the foundation's Advancement team with decades of legal, tax and development experience
- Planned giving expertise and sophisticated giving vehicles such as charitable gift annuities, charitable remainder trusts and charitable lead trusts
- Positive brand affiliation with the foundation by virtue of having an organizational fund backed by the services and reputation of the Cleveland Foundation

To learn more about how an organizational fund can strengthen a nonprofit you care about, please contact a member of the Advancement team at **877-554-5054**.

## Reserve Your Tickets Today!



### CLEVELAND FOUNDATION ANNUAL MEETING: Building Common Ground

Presented by

**KeyBank**

**May 10 at 4 p.m.**

State Theatre at Playhouse Square

Featuring the Robert D. Gries Keynote Lecture by Steve Case, Chairman and CEO, Revolution LLC; Co-Founder, America Online; author, "The Third Wave;" and philanthropist, the Case Foundation.

*Tickets available on a first-come, first-served basis via [www.PlayhouseSquare.org](http://www.PlayhouseSquare.org) or 866-546-1353.*

## Save the Date!

### 82ND ANISFIELD-WOLF BOOK AWARDS

**September 7 at 6 p.m.** Cleveland Book Week Marquee Event!

State Theatre at Playhouse Square New Venue!

The Anisfield-Wolf Book Awards presented by the Cleveland Foundation recognize books that have made important contributions to our understanding of racism and our appreciation of the rich diversity of human cultures. For more than 80 years, the distinguished books earning Anisfield-Wolf prizes have opened and challenged our minds.

*Tickets available in July.*



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## TURNING PASSION INTO PURPOSE

To learn more about giving through the Cleveland Foundation, please call 877-554-5054.



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