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# Greater University Circle Initiative: Year 4 Evaluation Report

Ziona Austrian

Cleveland State University, [z.austrian@csuohio.edu](mailto:z.austrian@csuohio.edu)

Kathryn W. Hexter

Cleveland State University, [k.hexter@csuohio.edu](mailto:k.hexter@csuohio.edu)

Candi Clouse

Cleveland State University, [c.clouse@csuohio.edu](mailto:c.clouse@csuohio.edu)

Kenneth Kalynchuk

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*Maxine Goodman Levin*  
*College of Urban Affairs*

Prepared for:  
**The Cleveland Foundation**

Prepared by:  
**Ziona Austrian, Ph.D.**  
**Kathryn W. Hexter, MCRP**  
**Candi Clouse, M.S.**  
**Kenneth Kalynchuk**

**GREATER UNIVERSITY  
CIRCLE INITIATIVE:  
YEAR 4 EVALUATION  
REPORT**

The Center for Economic  
Development  
&  
The Center for Community  
Planning and Development

2121 Euclid Avenue Cleveland, Ohio 44115  
<http://urban.csuohio.edu>

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## INTRODUCTION

This report evaluates the fourth year of the Economic Inclusion program of the Greater University Circle Initiative (GUCI) in Cleveland, Ohio, namely the activities and accomplishments during 2014. The GUCI combines the economic power of anchor institutions with the resources of philanthropy and government to create economic opportunity, build individual wealth, and strengthen communities in the neighborhoods around University Circle and the Health Tech Corridor of Cleveland. The program, spearheaded by The Cleveland Foundation, is based on the premise that anchor institutions and residents share an interest in revitalizing their neighborhoods and by working together they can create jobs, income, and ownership opportunities for low-income people. These neighborhoods are among the most disinvested in the city of Cleveland, Ohio.

This report has been prepared for the Cleveland Foundation by a team of evaluators from the Centers for Economic Development and Community Planning and Development at Cleveland State University's Levin College of Urban Affairs.<sup>1</sup>

This report describes the outcomes related to the four goals of GUCI: Buy Local, Hire Local, Live Local, and Connect Residents, as well as the collaborative process and structure that underlies the whole initiative. It tracks the progress of programs and projects that support the goals of the initiative, including those funded by the Cleveland Foundation as well as those carried out by the three anchor institutions in Cleveland's University Circle neighborhood: Case Western Reserve University, The Cleveland Clinic, and University Hospitals Health System.

The information presented in this report is derived from interviews with the members of the Greater University Circle Community Wealth Building Initiative's Economic Inclusion Management Committee (EIMC) and other key stakeholders, reviews of meeting agendas and minutes for the EIMC and its sub committees, briefings with GUCI principals at the Cleveland Foundation, reviews of background documents related to the GUCI, and primary data collected from stakeholders.

The GUCI began in 2005 as an initiative of the Cleveland Foundation. From 2011-2013, it was the recipient of additional funds from the national Living Cities' Integration Initiative, a pilot program in five cities across the country to promote economic inclusion.

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<sup>1</sup> Year 3 GUCI Programs & Projects Report can be found here:

[http://engagedscholarship.csuohio.edu/cgi/viewcontent.cgi?article=2264&context=urban\\_facpub](http://engagedscholarship.csuohio.edu/cgi/viewcontent.cgi?article=2264&context=urban_facpub)

Year 3 Formative and System Change Report can be found here:

[http://engagedscholarship.csuohio.edu/cgi/viewcontent.cgi?article=2263&context=urban\\_facpub](http://engagedscholarship.csuohio.edu/cgi/viewcontent.cgi?article=2263&context=urban_facpub)

Year 3 Evaluation Executive Summary can be found here:

[http://urban.csuohio.edu/publications/center/center\\_for\\_economic\\_development/LivingCities\\_ExecutiveSummaryYr3.pdf](http://urban.csuohio.edu/publications/center/center_for_economic_development/LivingCities_ExecutiveSummaryYr3.pdf)

## CIVIC INFRASTRUCTURE: A NESTED SET OF TABLES

The strength of the Greater University Circle Economic Inclusion Initiative lies in the collaborative work of the participating organizations that takes place at the Economic Inclusion Management Committee (EIMC) table. Together, committee members work to achieve four shared economic-inclusion goals: Buy Local, Hire Local, Live Local, and Connect. As a result of these collaborative efforts, stakeholders are on a path toward lasting and substantial community benefit in the neighborhoods surrounding University Circle and the Health Tech Corridor. Committee members have developed new ways of working together and invested considerable time, dollars, and ideas to meet shared goals. The work is very much place based, with a goal of materially improving the lives of the people who live in these neighborhoods; neighborhoods with some of the highest rates of social, economic and health distress in the city.

Now in its fourth year, the EIMC can begin to point to significant changes in how the stakeholders do business individually and collaboratively, which in turn is yielding tangible improvements for area residents in terms of jobs, business opportunities, physical development and social cohesion.

The Greater University Circle Initiative (GUCI) leadership table, the “parent” entity for the EIMC, was formed in 2004. Now in its 10<sup>th</sup> year, GUCI is comprised of the top leaders from the participating organizations. The group meets two to three times a year and every three years, most recently in May 2014, committee members set three-year goals, reaffirm their commitment to work together and empower their organizations to participate in the initiative.

The EIMC, nested within GUCI, is a table of “doers” from the participating organizations. Many participants view it as one of the best things that emerged from the affiliation with Living Cities. The GUCI lays the foundation and sets the goals for collaboration but the EIMC is where the goals get translated into projects and programs. It is where the change is happening.

## FUNDING AND STRUCTURE

2014 was a transition year for the EIMC. The three-year affiliation with Living Cities concluded. The three-year, \$3 million grant from Living Cities wrapped up as did the national/local evaluation partnership. Early in 2014, the EIMC and The Cleveland Foundation made the decision to continue the initiative. Funding for 2014 in the amount of \$3.4 million was provided by the Foundation for affiliated projects and programs and administrative costs.<sup>2</sup>

Two new co-chairs were appointed to two-year terms to lead the committee, Aparna Bole, MD, a pediatrician and Director of Sustainability for University Hospitals and Jon Utech, Senior Director of the Office for a Healthy Environment at the Cleveland Clinic. The outgoing chairs,

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<sup>2</sup> This amount includes a \$350,000 grant to Famicos Foundation for housing acquisition, rehab, and neighborhood stabilization. This grant may be spent over a five-year period.

Tracey Nichols, Director of Economic Development for the city of Cleveland, and Jennifer Ruggles, Executive Director, Government Relations at Case Western Reserve University, remained on the committee. Two new organizations were added to the EIMC, the VA Medical Center and The St. Luke's Foundation. Continuing organizations deepened their participation, adding people with expertise in the four goals as well as neighborhood development.

15 organizations participate on the EIMC, with staff serving as members of the Executive Committee, and/or one of the three subcommittees (Buy Local, Hire Local, Live Local/Connect). In 2014, the EIMC had 33 members from the 15 participating organizations, the Executive Committee had 15 members from 10 organizations, and another 25 members served on one of the subcommittees. A total of 58 individuals served in one or more of these three capacities (See attached list).

When Bole and Utech began their terms as co-chairs they undertook a thorough review of EIMC goals and objectives in light of the new goals set by the GUCI leadership group in May 2014. They also looked critically at the structure and the roles of the EIMC, and its executive committee and sub-committees, especially in terms of how well the committee was making use of people's time. Each sub-committee's goals and objectives were reviewed and revised as needed.

As a result of this review, the scope of the Initiative broadened in two areas. First, an ad hoc working committee (the Local Food Committee) of the anchor partners and their food service contractors was created to talk about ways to increase the share of local food through joint purchasing, continuing in the spirit of transparency and collaboration of the EIMC.

Second, a new group focusing specifically on community economic development and neighborhood stabilization was convened by India Pierce Lee, The Cleveland Foundation's Program Director for Neighborhoods, Housing and Community Development. The group began meeting in October 2014. Leaders of 14 organizations from the GUC neighborhoods who had not previously been on an EIMC committee, plus others who had been involved, were invited to share plans, aspirations and challenges in stabilizing communities, engaging residents and finding opportunities to collaborate and align their work more closely with the Economic Inclusion Initiative. In early 2015, the group agreed on a name, Thrive Local, and it will become the fourth sub-committee of the EIMC.

In addition, discussions are underway to consider adding a new goal related to Community Health. Further, the EIMC program director, Walter Wright, is interested in ways to share the lessons learned from the GUC with others in the city, and has reached out to other anchors with an eye to creating a "network of networks" of those with anchor strategies – Greater University Circle, the W. 25<sup>th</sup> Street Initiative, and the Campus District.

The Cleveland Foundation continued to provide strong leadership (India Pierce Lee and Lillian Kuri) and strong staff support (Walter Wright and Toni White) during this transition year.

Further, the Foundation made a commitment to fund the staff for at least two more years, through the end of 2016 with an annual grant of \$220,000. Program staff, who had been housed at the Foundation during the first four years of the EIMC, were transitioned to a permanent home at Cleveland State University's Levin College of Urban Affairs. The move occurred at the beginning of 2015, but plans for the transfer and consultation with the leadership of EIMC occurred during the last three months of 2014. The funding commitment from the Cleveland foundation, the affiliation with Cleveland State's Levin College, and the staff transition strengthened the Initiative and gave it greater focus on economic inclusion and community economic development.

## VALUE OF EIMC

Since the EIMC was created in 2011, anchor participation and commitment has deepened, especially for the two health care systems, UH and CCF. They recognize that change takes time, but the commitment of leadership through the 10 years of participation in the GUCI provides the impetus for moving forward. More people and departments from the anchors participate and as relationships strengthen and trust builds, the members participate more fully. As Andrea Jacobs, Executive Director of Operations at the Cleveland Clinic put it: "Seeing the collective power of the anchors is inspiring....It is important that the Clinic be part of it." Heidi Gartland, Vice President, Government Relations at UH shared similar sentiments. For UH, prioritizing neighborhood investment in the GUC and HTC represents a cultural shift. They now think of the community in tandem with their other goals. This is a direct result of participation in the EIMC and GUCI.

The EIMC is a goal oriented collaborative that can benefit all partners, especially those whose goals are aligned with the goals of the collaboration. The anchor partners value their collaborative work at the "table" for many reasons. First, it gives them "space" to innovate together. The EIMC has "driven a lot of the thought processes" generating ideas for new programming at the anchor partners. It is one of the few places where they can collaborate, share best practices and develop synergy. Participants believe there is an honest exchange of information around the table.

The health care anchors have a set of internal goals related to providing benefits for patients, students, and the community. For example, each health care system has a healthier hospitals initiative. After working together for four years on the EIMC, they were able to have a conversation about how they could serve healthier food to their employees and patients. The local food group mentioned above was formed to find ways to use their collective purchasing power to influence local distributors to provide a greater share of locally grown and locally processed products to meet those needs. The group members include the anchors' sustainability directors, their food service vendors and Morgan Taggart, a program specialist at OSU Extension and co-founder of the Cleveland-Cuyahoga County Food Policy Coalition. It was suggested that without the trust built through the EIMC, the anchors would not have been in the position to have such conversations.



Second, the anchor partners realize that anything they do has a large impact and they want that impact to be positive for the communities surrounding their facilities. To strengthen its community benefit, in 2014, the Cleveland Clinic hired Vickie Eaton Johnson, as the senior director of community relations. Johnson had formerly been the Executive Director of the Fairfax Renaissance Development Corporation, a community based organization representing the Fairfax neighborhood in which the Clinic's main campus is located.

The EIMC has not only opened up more opportunities for the hospitals to work together, but it has also opened up opportunities for the anchors to partner with Neighborhood Connections (NC). For example, in 2014, UH reached out to NC to help launch a pilot program in the GUC neighborhoods related to community health needs assessments. The idea to pilot the program in the GUC came about through UH's participation in the EIMC. NC was a logical partner, based on its previous positive working relationships with UH on StepUp to UH and the health hubs project. UH continues to look at other programs that can be implemented within the HTC or GUC.

Other partners identified similar benefits. For example, Aram Nerponi, Executive Director of BioEnterprise, values the EIMC because it links him to diverse, collaborative resources like the workforce development members. He views the meetings as a very efficient way to hear other perspectives and cited the high level of trust and engagement and the focus on decision-making among the partners. It also is the only place where people are trying to figure out how to plug residents into the biomedical economy, including linking area schools to entry-level jobs with biomedical companies. The EIMC keeps the focus on the neighborhood perspective and achieving neighborhood impact.

The city of Cleveland's priorities also align with those of the initiative, particularly its CBA work and the large investment the city made in the HTC and MidTown.

## EVIDENCE OF CHANGE

Changing policies and practices within a large organization like the Clinic or UH takes time. Through participation in the Initiative anchors have seen many ways they can have a more positive impact on surrounding neighborhoods; but it takes time to shift direction. Their core business is health care and it is important to make the business case for greater involvement in the community, whether it is local hiring, community healthcare, or sustainability. It is also important to be able to quantify that impact. For example, the Cleveland Clinic sees the EIMC's local purchasing and hiring goals as an important part of their resiliency strategy, a way of positioning them to sustain operations in case of a disaster. Everything they do comes back to patient value, which is the Clinic's bottom line. Further, all anchors reveal that measuring results and sharing them publicly, as is done with the EIMC annual assessments, demonstrates progress and encourages them to do more.

Both health care systems noted that participation in the EIMC has not only changed the way they work with the GUC neighborhoods, but it has also changed how they align with the neighborhoods surrounding their other facilities, outside their main campuses.

## CHALLENGES GOING FORWARD

Develop Impact Measures. Going forward, it will be important to continue to work on the initiatives that have been developed by the EIMC. However, it will also be important to focus on impact. This will require prioritizing the development of metrics that demonstrate an impact on neighborhoods and residents. It will also require a discussion of moving from pilot to scale to long-term impact.

Focus on initiatives that stand to benefit from collaboration. It is important to distinguish between collaborative programs and projects inspired by participating on the EIMC and those that may also be inspired by participating in the group, but that are done independently by each anchor, or other stakeholders. For the anchor members, it is easiest to collaborate in areas that are not the core business, i.e. not directly related to the delivery of health care.

Maintain momentum in light of changes. There are two changes underway that will challenge the commitment of the partners to participate in the collaboration: the changing business model for health care and recent retirements of key GUCI leaders. The new business model is intensifying the pressure to cut costs while maintaining quality in health care delivery. Further, in 2014, two high-level GUCI anchor leaders retired (Pudge Henkel at The Cleveland Clinic and John Wheeler at Case Western Reserve University). At the Clinic, the commitment has not only endured, it has strengthened with new leadership. At CWRU, John Wheeler's retirement is much more recent and his replacement was not named by the end of 2014 (note: Julie Rehm, CWRU Vice President, Government and Community Relations, is now more prominent in GUC).

## BUY LOCAL

The Buy local goal encompasses several initiatives. It includes business attraction and retention along the Health Tech Corridor (HTC), joint anchor procurement, small business microloan finance through ECDI (the Economic and Community Development Institute, which has also developed the Culinary Launch Kitchen in the Health Tech Corridor to help bring added-value food products to market), and capacity building through the training provided by Next Step, which is administered by University Circle Inc., and the Evergreen Cooperative Corporation (ECC) and its coops. The Cleveland Foundation provided funding in the amount of \$1.1 million for the implementation of these initiatives in 2014. These four initiatives complement each other in achieving the goal of increasing the share of local goods and services purchased by the anchors as a way to benefit the area. Local has several definitions, from the smaller area of Greater University Circle neighborhoods, to the city of Cleveland, and Cuyahoga County.

## HEALTH TECH CORRIDOR

The Health-Tech Corridor (HTC) is the transit corridor served by the RTA HealthLine, Cleveland's first bus rapid transit line, which stretches from Downtown Cleveland through University Circle and into East Cleveland, connecting nine city neighborhoods over 3 miles and 1,600 acres. GUCI efforts have helped brand the HTC and attract companies to locate along the Corridor since 2010.

The HTC is a prime location for biomedical, healthcare, and technology companies looking to take advantage of four world-class healthcare institutions and their auxiliaries (including The Cleveland Clinic and University Hospitals), eight business incubators, four academic centers, and more than 123 high-tech companies engaged in the business of innovation.<sup>3</sup>

MidTown Cleveland, an economic development corporation serving a large portion of the HTC, has wholeheartedly embraced their home in the heart of the HTC. Featured stories in their 2014 annual report highlight the excitement surrounding new developments in the HTC.<sup>4</sup> The area is a complementary employment zone to University Circle and Downtown.

Significant accomplishments to promote development along the Health-Tech Corridor in 2014 include the hiring of its first director along with the creation of a new position in Cleveland's Department of Economic Development, and three projects expected to spur additional development along the Corridor. With a director on board, the HTC has gained momentum, and established a marketing, business development, and real estate development strategy. The announced projects include a 100 gigabit fiber network along Euclid from the Campus District through University Circle; the introduction of a co-working space, run by Pittsburgh's successful *Beauty Shoppe*, in the Victory Building; and the opening of *We Can Code It*, a coding academy

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<sup>3</sup> [http://www.bioenterprise.com/resources/uploaded/documents/Midwest%20Healthcare%20Growth%20Capital%20Report%20-%20press%20release%20YE2014%20\(FINAL\).pdf](http://www.bioenterprise.com/resources/uploaded/documents/Midwest%20Healthcare%20Growth%20Capital%20Report%20-%20press%20release%20YE2014%20(FINAL).pdf)

<sup>4</sup> <http://www.midtowncleveland.org/media/documents/mtc-2014annualreport.pdf>

for women and minority Cleveland residents interested in technology and engineering. The fiber network project, which is jointly funded by the federal Economic Development Administration, the City of Cleveland, and OneCommunity, will be faster than any network in an American city.<sup>5</sup>

## Staffing

Jeff Epstein was hired as the first HTC director four years after the city of Cleveland and nonprofit partners announced plans to re-brand the stretch of Euclid Avenue between downtown and University Circle. Epstein, formerly the Vice President of Development at the Coral Company, a local real estate developer, was charged with marketing and development of the HTC, with a goal to stimulate residential and commercial activity going west from University Circle and east from downtown. It should be noted that the broader focus on residential development is a significant shift for MidTown and the HTC. It signals recognition of the importance of creating a vibrant neighborhood in the overall development of the corridor.

Epstein focused on expanding marketing efforts during 2014. The HTC hired a web design firm located in the HTC footprint to redesign the HTC website, adding video and interactive mapping features and integrating real estate availability into the site. They also hired an intern from Case Western Reserve University's Weatherhead School of Business to work on a variety of marketing projects for the HTC, including designing and sending e-newsletters, researching competitive biomedical corridors, identifying lists of companies to target for relocation into the HTC, and researching crime data in the area. By the end of 2014 there were over 15 active businesses considering relocation into the Corridor, and there were three projects in the predevelopment phase along the HTC: Hemingway/Geis development's planned MidTown Tech Park IV, a residential and commercial development by a private development team, and a clinical project by one of the healthcare institutions.

## Real Estate Projects

The Economic Development Administration of the U.S. Department of Commerce awarded a \$700,000 grant to wire the HTC with the nation's first commercially available 100 gigabit fiber network. This network is expected to be transformational. It will help Cleveland, and the HTC, compete for businesses related to Healthcare IT and Telemedicine, areas expecting huge growth in the health and technology fields in the coming decades.<sup>6</sup> HTC, along with its partners OneCommunity, ideastream, Case Western Reserve University, and the City of Cleveland, garnered media attention locally and nationally with over 20 articles. Living Cities funding helped to create a web site to promote the 100 gigabit effort, [www.100gigcle.org](http://www.100gigcle.org), along with a video about the announcement. Efforts to leverage the 100 gigabit announcement to attract more business with direct mail and online media campaigns are underway.

During 2014, the core and shell construction on the Victory building on 7012 Euclid Ave. was

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<sup>5</sup> <http://www.onecommunity.org/100-gig-fiber-network-for-htc/>

<sup>6</sup> Interview with Director Tracey Nichols, City of Cleveland's Department Economic Development

completed and the developer is continuing in his efforts to attract new tenants. An 18,000 square foot coworking space is planned as the first tenant for the building, thanks to a \$600,000 grant from the city of Cleveland to build out the coworking space and a loan of \$150,000 from the Cleveland Foundation. Students from the Cleveland Institute of Art, located in University Circle, offered design ideas for the build out of the space. Working with partners from JumpStart, BioEnterprise, the City of Cleveland, MidTown, and the Cleveland Foundation, the HTC selected a for-profit coworking operator, the Beauty Shoppe from Pittsburgh. The Beauty Shoppe was selected based on its business experience operating a similar space since 2011, and its commitment to include the neighborhoods and residents surrounding the HTC. The coworking space is expected to open in June 2015. It will offer high quality professional shared office space starting as low as \$150/month with no long term commitment. It is expected that this space will be in high demand by startup businesses and individual entrepreneurs.

We Can Code IT academy focuses on diversity in technology and engineering. Founded in 2013, it provides education and mentorship in technology and engineering to those who are underrepresented in that area. It focuses on empowering women, African Americans, and Hispanic Americans, groups that are underrepresented in technology and are in low to moderate income levels. The academy offers computer and engineering workshops for kids and adults, and coding boot camps for adults looking to join the IT industry.

Knowing that the ultimate metrics for the HTC revolve around job creation and neighborhood wealth, the HTC director has established a series of intermediate success metrics for the HTC for the next several years (see Table 1).

**Table 1: HTC Success Metrics**

Outcome Metric	Target	Results
New Tenants	5-7/yr	15+ active prospects; 3 reviewing leases
Square footage absorbed –	50,000 – 100,000 SF/year	
New/renovated space under development	50,000 SF/yr	Geis announced 80,000 SF
HTC occupancy	Above 70%	Currently at 61%

However, looking at the type of companies that existed in the HTC s of December 2014 reveals that the number of businesses and organizations located along the HTC include 18 pharmaceutical companies, 10 venture capital firms, 49 medical device companies, 13 healthcare technology companies, 40 non-healthcare technology companies, as well as other businesses not related to the mission of HTC. The largest numbers of new companies since 2011 have been in the healthcare IT and pharmaceutical sectors.

Other progress along the HTC includes the completion of core and shell construction at 6555 Carnegie in 2013 and the addition of two new tenants in 2014 including a media company and a manufacturer of nano fibers; the retention of Applied Industrial Technologies, a Fortune 1000

company, with its 300 employees in their current facility on the HTC; finishing the design and fund raising for the painting of the E. 55<sup>th</sup> Street bridge (the city of Cleveland has committed over \$200,00, MidTown Cleveland has committed \$15,000, and the Cleveland Foundation \$40,000) for a completion of the work by mid-2015; and finding funding for the development of 11 acres between East 57<sup>th</sup> and 63<sup>rd</sup> on Euclid Avenue into a research and technology campus of post-incubator space. Other real estate projects which began in 2014 include the new Third District police station and the new Little Italy-University Circle Rapid Transit station.<sup>7</sup>

### City of Cleveland Investments

The City of Cleveland has made major investments in the HTC by rehabilitating buildings, assisting tenants, enabling new construction, initiating general beautification efforts, and conducting brownfield assessment and environmental remediation. Since 2008, the city has been involved in 44 acres of brownfield assessment and almost 29 acres of brownfield remediation for 18 different sites along the corridor. The city spent \$9.8 million on brownfield-related activities, which represented 71% of the total brownfield remediation costs with the remaining costs split between other sources. Since 2008, the city has also invested \$12.8 million renovating 417,000 square feet of space. Additionally, eight new construction projects totaling \$43.5 million in investments were completed in 2014, with the city covering 33% of the cost. Of the nearly 1.3 million total square feet created as a result of these investments, around 64%<sup>8</sup> of the new commercial space has been leased. These projects created 970 new jobs and retained 1,667 jobs in the city.<sup>9</sup>

Overall, the investment that the city of Cleveland has made over the past eight years in the corridor totals over \$70.8 million. This helped leverage an additional \$160.3 million in investment in the corridor. A shift in priorities on the Warner & Swasey project resulted in removing that project's data and funding from these figures, causing a decrease in reported investment levels from previous reports. The city is looking to reallocate the funds to another significant project in the HTC.

### ANCHOR PROCUREMENT AND SUPPLY CHAIN INITIATIVES

The goal of the anchor procurement and supply chain initiative is to identify opportunities for joint purchasing among the three anchor institutions in the Greater University Circle area and leverage their purchasing power to increase local economic activity and build community wealth. With funding from Living Cities and Cleveland Foundation, BioEnterprise serves as the facilitator and enabler of this ongoing conversation among the institutions and the vendors. The supply chain committee includes the supply chain director from each anchor, the Cleveland Foundation, and BioEnterprise.

The committee members have been working together since 2012 to identify a viable business opportunity for joint purchasing. Over time the committee members openly engaged in a

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<sup>7</sup> <http://thedaily.case.edu/news/?p=21769>

<sup>8</sup> Estimate using 2013's figure

<sup>9</sup> City of Cleveland investment figures were provided by the City of Cleveland

productive discussion and shared information on their best practices, maturing contracts, and vendor lists. The level of peer trust, comradery and achieving the common goal of creating positive economic improvement for the surrounding neighborhoods became the foundation of the Supply Chain Initiative.

In 2014, supply chain leaders from CWRU, the Cleveland Clinic, and University Hospitals issued a joint Request for Information to two existing vendors with out-of-state headquarters to explore the creation of a stand-alone, scalable, state-of-the-art Mail Hub facility to process external and interoffice mail for all the anchor institutions. Following site visits and presentations to the supply-chain committee, the anchors agreed to move forward with an RFP to potentially locate the joint facility in the current CWRU's mail facility and to add an emphasis on workforce development. Decision on the creation of the joint mail hub will occur in 2015.

The new proposed mail hub will create efficiencies for the institutions, as well as produce positive wealth building outcomes such as generating additional pathways to employment and training at a scalable, stand-alone facility; transitioning existing employees from manual processes to the state-of-the-art technology serving multiple clients; creating a scalable business with a potential to add other clients; and creating new employment opportunities. It should be noted, that creating the new Mail Hub may result in initial job losses. (Note: the RFP stipulates that any affected worker would be placed in an equivalent position either with the vendor or anchor institution). However, the new technologies create new efficiencies and competitive advantage for the business and will position it for future growth. Moreover, the higher technical know-how and responsibilities would position these employees for future successes. In addition, this project will prioritize the University Circle neighborhoods for new hires. The joint Mail Hub will create annual cost savings of \$150,000 to \$500,000 for the anchors that will be redistributed into efforts to increase local procurement and hiring.

Building on the Mail Hub momentum, the Supply Chain committee is engaged in discussing other projects to be located in the city of Cleveland. The second possible project is the creation of a Central Sterilization facility, which is becoming more common across the country. This project is in the early exploratory stages but discussions have already expanded beyond the three anchors to include the Metro Health System and St. Vincent Charity Medical Center, both located in the city of Cleveland.

In addition to identifying opportunities for joint purchasing of local goods and services, the three anchors have undertaken efforts to increase the local share of purchasing on their own. The percent of local purchasing by each anchor is an important metric for the GUCI. The three anchors combined spent almost \$2.9 billion on goods and services in 2014 (Table 2). Of this amount, 13.5% was spent in the city of Cleveland and 28% in Cuyahoga County.<sup>10</sup>

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<sup>10</sup> Procurement data was provided by each anchor institution.

Table 2: 2014 Anchor Procurement

	Case Western Reserve University		Cleveland Clinic		University Hospitals	
	<i>Dollar Amount</i>	<i>% of Total</i>	<i>Dollar Amount</i>	<i>% of Total</i>	<i>Dollar Amount</i>	<i>% of Total</i>
<b>Total Procurement</b>	\$447.4M		\$1,743.0M		\$710.7M	
<b>Vendors in Cuyahoga County</b>	\$128.6M	29%	\$368.9M	21%	\$314.5M	44%
<b>Vendors in the City of Cleveland</b>	\$76.4M	17%	\$189.8M	11%	\$126.6M	18%
<b>Vendors located outside Cuyahoga County</b>	\$318.8M	71%	\$1,374.1M	79%	\$396.3M	56%

Case Western Reserve University alone spent over \$447 million on procurement 2014. Of this amount, more than \$76 million (17%) was spent in Cleveland, and another \$52.2 million was purchased from businesses located in the suburbs of Cuyahoga County, for a total of almost \$129 million that was spent in Cuyahoga County (29% of all spending) . Additionally, both total spending and local spending at CWRU have increased since 2011. The share of their purchases in Cleveland increased from 15% to 17% and the share of their purchases in Cuyahoga County increased from 26% to 29% of their total spending.

The Cleveland Clinic spent over \$1.7 billion on procurement in 2014, with 21% (nearly \$369 million) spent with Cuyahoga County vendors including nearly \$190 (11%) million with city vendors. The overall spending of the Cleveland Clinic increased between 2013 and 2014 by \$32 million, with a \$17 million increase in the city and an additional \$13 million increase from elsewhere within the county.

University Hospitals had a total 2014 procurement of almost \$711 million. They spent over \$314 million (44%) with Cuyahoga County vendors including more than \$126 million (18%) with vendors in Cleveland. Their county spending grew by \$140 million between 2013 and 2014. This increase can be explained by the hospital systems' construction projects and the additions of Parma and Elyria Hospitals. Spending with vendors located in Cleveland increased by \$2.5 million. UH's share of spending done within Cuyahoga County increased by 14% over the previous year, while their share of spending in Cleveland remained at 18% in 2014.<sup>11</sup>

<sup>11</sup> The percentages of local procurement underestimate the impact of the anchors on the local economy. The location of vendors or suppliers is identified by the location of the companies' billing address. However, in some services, the supplier is a national company located outside of Ohio, but local labor is employed to provide the direct services. Examples include security, parking, and food services. The local employment created by these companies is excluded from the estimates of "buy local" and "hire local" for now – although the discussion about tracking employees of vendors and subcontractors began in 2014, and is expected to be introduced in 2015.



## SMALL BUSINESS DEVELOPMENT: NEXTSTEP PROGRAM

A third focus area of the “Buy Local” goal is small business development. With initial funding from the Cleveland Foundation and Living Cities, UCI, Inc. obtained a license to operate the 10-year old national Interise program in Cleveland. Interise’s mission is to stimulate economic revitalization in lower income communities by providing a diverse group of small business owners with entrepreneurial education, new networks, and access to markets. Interise developed the StreetWise ‘MBA’™ program to give small business owners in historically underserved and lower income areas the tools, training, and networks to turn plans into action. The Cleveland model is called NextStep and it includes seven months of intensive classroom instruction provided by one dedicated instructor including one-on-one coaching. The Cleveland curriculum is modeled after the national curriculum. Interise also offers help in marketing the program, evaluating the training during the course, following with the graduates for a couple years, and other tools to run a successful program.

NextStep was licensed for three years and additional funding was received from Key Bank Foundation and Charter One Foundation. The program was offered for the first time in 2014. With a capacity of 15 participants, 12 enrolled, and 10 business owners graduated. Seven of the ten graduating businesses were located in the GUC and HTC neighborhoods. Requirements for participation included a fee of \$1,250; annual sales of \$200,000-\$1 million; to be in business for several years; and commit time to the class. The program enables participants to interpret their financial statements, better understand their business, and make better decisions. Before graduating, each participant presented his or her growth plan to a panel of industry experts and other business leaders and received feedback, advice, and connections.

Several lessons were learned from the first class: getting companies to enroll is the most difficult task and should be a year round activity; enrolling the business owner is critical; a pre-screening mechanism to measure an applicant’s ability to devote time to the class and create a business growth plan; and balancing the need to fill the class and having the right mix of people and companies. In October 2014, NextStep won a prestigious award from Interise, for having the highest percentage of participants from low-to moderate-income census tracts. NextStep, by design recruits businesses from the GUCI neighborhoods and receives assistance from the CDCs working in these areas.

## THE EVERGREEN COOPERATIVES CORPORATION AND THE EVERGREEN COOPS

The Evergreen Cooperatives, a group of worker-owned businesses, have been an important program under the Buy Local goal since their launch in 2009 by the Cleveland Foundation and the GUC anchor institutions.<sup>12</sup> By 2014, there were three Evergreen Cooperatives operating in Cleveland: Evergreen Cooperative Laundry, Evergreen Energy Solutions, and Green City

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<sup>12</sup> <http://evergreencooperatives.com/business/evergreen-laundry/>

Growers. Evergreen Cooperative Corporation (ECC) governs the cooperatives and Evergreen Business Services (EBS) maintains the overall functionality of the cooperatives.

The cooperative structure has evolved in response to the challenges of creating this innovative wealth-building model. Finding the appropriate balance between social, business and environmental goals has been challenging at times, contributing to some management changes at the ECC as well as the individual cooperatives since they were launched.

The ECC was created as a nonprofit umbrella organization to oversee and support the work of the three cooperatives and the pipeline of potential new cooperatives. The ECC strengthens the business practices of the cooperatives through EBS, a subsidiary that offers day-to-day support services for the coops including legal, human resource, information technology, sales and marketing, payroll, and tax services. The EBS charges a fee to the coops for services rendered, and it instituted a fee-based consulting arm to work with others who are interested in replicating the evergreen experience in other cities.

In 2014 Steve Standley of University Hospitals completed a term as the first Board Chairman of ECC and Ronald Richard, the President and CEO of the Cleveland Foundation began a new term as chair. Andrea Jacobs of the Cleveland Clinic serves as co-chair and Heidi Gartland joined the board representing University Hospitals. Representatives from CWRU and other business and foundation leaders comprise the board which remains mostly unchanged. The role of the anchors has been formalized on the board as each anchor holds one seat.

Interviewees credited Steve Standley with turning the organization around, refocusing its mission and making sound business decisions. Thanks to these efforts, the Evergreen coops are closer to financial independence. Two “support” programs were developed for employees, Evergreen Housing and the Evergreen car program, described below. By the end of 2014, ECC added its 20<sup>th</sup> employee to Evergreen housing and was looking to add its 8<sup>th</sup> employee to the Evergreen car program. Looking forward to 2015, ECC expects to continue its focus on growing the original three coops and exploring a new opportunity of a light manufacturing facility which would sell to a larger manufacturing facility.

Much of the groundwork for these significant accomplishments was laid in 2013 when the ECC worked to identify gaps and weaknesses. The year 2014 was characterized by implementation of many of the recommendations made in the previous year. John McMicken, who held senior level positions in business development and operations management and who successfully launched several technology startups, was hired to be the first full time CEO. McMicken began working with the ECC board to tighten the overall legal structure and separate the nonprofit ECC from the for-profit individual cooperatives and the for-profit EBS. During 2014, service agreements were finalized between EBS and each of the individual coops, and between EBS and the ECC.

The EBS has a new board of its own, chaired by Mary Beth Levin, Esq., who is with University Hospitals. Jon Utech, Senior Director of the Office for a Healthy Environment at the Cleveland Clinic, and the co-chair of the Economic Inclusion Management Committee, is on the board of EBS. The EBS board is involved in the day-to-day issues of the coops and it makes recommendations to the ECC board on funding, budgets, loans, and other financial matters. The goal of EBS for 2015 is to grow EBS revenues through increased sales at the coops and providing more consulting to outside organizations and cities.

There has also been a shift from calling employees “worker-owners” to “members.” This change occurred due to some unfulfilled expectations associated with the term “owner.” The new structure encompasses the members’ rights and responsibilities more accurately. Finally, the length of time for employees to achieve membership status has changed from six months to one year, per member request.

At each of the individual coops, the leadership focused on increased efficiencies and quality of service. As a result, for example, the **Evergreen Cooperative Laundry (ECL)** reduced its operating costs and payroll as well as increased the price point charged to customers. By the end of 2014, the Laundry had 39 employees and the business had its first profitable year. One reason for the increased profitability was increased efficiencies and volume. Another reason was that University Hospitals negotiated a new long-term contract with its current laundry provider that included a subcontract for a small portion of laundry services with the ECL. It was a win-win-win arrangement: University Hospitals got help reaching the requirements for the Community Benefit Agreement, the coop got new business, and the current vendor was able to renew its contract with net increased volume because of new UH hospital acquisitions.

**The Evergreen Energy Solutions (E2S)** had 14 employees by the end of 2014. During the past two years it diversified from only installing solar panels to providing general construction services and the installation of LED lighting. It has also rehabbed houses in partnership with Famicos Foundation, a community development group. However, lighting retrofits in buildings and large garages provides E2S with its biggest pipeline of opportunity. Lighting project in the Cleveland Clinic garage is a good example. The payback of converting to LED lighting is 3 to 5 years and the saving afterwards is up to 70%. E2S is expected to work on parking garages, lecture halls and apartment buildings, with much of the work coming from the anchor institutions (currently working on projects for the Cleveland Clinic and Case Western Reserve University). It is expected that the number of employees at the E2S will grow because of the large market for their services in the LED arena. This diversification of services offered by E2S increased the need to train workers. The E2S has a steady pipeline of work and was slightly profitable in 2014.

The business model of **Green City Growers (GCG)**, the youngest of the three coops with 31 employees, was being tweaked in 2014. It is changing its product mix and taking on new customers. It is also beginning to sell to retail venues such as groceries and restaurants, diversifying from primarily selling to wholesalers. GCG also opened up a booth at the West Side

Market which offers an outlet to move surplus product, provides exposures to shoppers and chefs, and provides a rotation opportunity for employees. In contrast to the other two coops, GCG, now in its third year of operation, was not profitable by the end of 2014. However GCG is the newest coop and is experimenting with the right product mix, client base and operating efficiencies. It is expected to turn the corner in 2015 with new product lines. Sixty percent of the space will be used to grow basil, a more profitable crop than lettuce. It will also experiment with different kinds of lettuce and change the mix of clients; it is also expected to hire additional employees.

It should be noted that for the first time in the history of the Evergreen Coops, two of the coops were able to distribute profits to their employees based on the profitability in 2014. Moreover, the coop members voted to distribute profits to all workers, not only to those that are already owner-workers, which boosted employee morale significantly.

Systematic changes have resulted in an improved financial outlook for the existing coops and the development of “support” programs to help employees purchase a home or an auto, as well as improved training and orientation for potential coop members. These support programs are designed as platforms for long-term employee stability and success. Further, the housing program can only be used by employees who wish to purchase homes in the GUC neighborhoods, and thus marries the concept of people-based and place-based initiatives, resulting in wealth building for both the individuals and the community.

## HIRE LOCAL

The Hire Local goal set by the EIMC members is to provide employment opportunities for GUC residents who are “hard to employ.” A number of strategies are used to accomplish this goal. The first is to increase the three anchors’ share of new hires that live in the GUC neighborhoods, retain them and provide them with opportunities to further their careers. Two specific programs include StepUp to UH at University Hospitals and Welcome to Fairfax at the Cleveland Clinic. The second is to provide employment opportunities through the Evergreen Cooperatives and the third strategy is to expand NewBridge, adding more employer demand driven adult training programs. In addition, some funding was allocated to the Cleveland/Cuyahoga County Workforce Investment Board to help with their strategic planning.

The initial goal set by the GUCI Leadership group in 2012 of 500 anchors’ new hires from the GUC neighborhoods over 10 years was met by 2014. When the Leadership group met in 2014, it proposed a new, more ambitious goal of 300 new hires in three years. The focus has been on building a neighborhood workforce pipeline to attract and retain workers for the anchor institutions and provide career pathways.

The first challenge was to set a baseline and track progress toward the new Hire Local goal. In 2013, the anchors worked together to accomplish this. The system they created was a significant milestone that enables them to collect comparable local hiring data to use for tracking progress toward the goal.

Another Hire Local strategy was to find a way to support current employees who live in GUC neighborhoods. Both the Clinic and UH agreed to use their employee “affinity groups” (or employee resource groups) that offer employees with shared interests an opportunity to meet monthly or quarterly. Both hospitals have started new affinity groups for their GUC employees. The Greater University Circle Employee Resource Group at UH had its first organizing meeting in January 2014 and has been meeting monthly since then. There is a core group of 12-15 people, with 33 employees who have indicated an interest in participating. In addition to doing a tour of the GUC neighborhoods, the group started an “ambassador program” to help hire and promote neighborhood residents. Many of the participants are long-term staffers who are also leaders and can help co-workers advance their careers at UH. The Cleveland Clinic is laying the groundwork for the group which will be managed by their office of diversity and inclusion. It will begin meeting in 2015, and will include vendor and subcontractor employees, an important component of entry-level jobs at the Clinic.

A third strategy is to provide jobs through the Evergreen Cooperatives. The Cleveland Foundation awarded funding of \$200,000 to advance these activities (funding for Evergreen is included in the Buy Local goal)

## ANCHOR HIRES

Analyzing the total employment for the three anchors shows that they had a combined employment of 66,657 at the end of 2014 (Table 3). Of these, 33,546 were employees at the three main campuses located in GUC. Almost 6% of main campus employees live in GUCI and over 17% live in the city of Cleveland. A total of 16,548, or 25%, of these employees are in entry-level jobs in Auxiliary Services, Aides, Clerical, and Food Service.

**Table 3: Total Anchor Employment, 2014**

Geography	All Employees	% of All Employees	Main Campus Employees	% of Main Campus Employees
GUCI	2,365	3.5%	1,993	5.9%
Cleveland	8,447	12.7%	5,809	17.3%
Cuyahoga	41,795	62.7%	24,707	73.7%
<b>Total</b>	<b>66,657</b>		<b>33,546</b>	

In 2014, the three anchors hired a total of 8,671 new employees (Table 4). Of the new employees, 563 or 6.5% were residents of a GUCI neighborhood. Almost 1,600 are Cleveland residents (18.3%), and almost 66% are Cuyahoga County residents (5,712). A total of 635 of the new hires in 2014, or 34%, of these employees are in entry-level jobs. Of these, 43 (6.8%) were residents of a GUCI neighborhood. Additionally, 72.1% of the new hires from the first quarter of 2014 were still employed with the anchor at the end of the year.

**Table 4: All Anchor New Hires by Location**

Geography	Total New Hires	% of Total New Hires
GUCI	563	6.5%
Cleveland	1,587	18.3%
Cuyahoga	5,712	65.9%
<b>Total</b>	<b>8,671</b>	

## Attract workers from GUC neighborhoods

In addition to the traditional hiring process, which does attract neighborhood residents as described above, the EIMC has resulted in two new anchor based efforts designed specifically to serve as a “pipeline” for hard to employ neighborhood residents to find jobs at UH and the Cleveland Clinic. The first, **StepUp to UH** is a partnership between University Hospitals, Neighborhood Connections (NC) and Towards Employment (TE), a local non-profit specializing in helping low-income and disadvantaged adults, including ex-offenders, in Greater Cleveland obtain and maintain employment as they advance up the career ladder. Step up to UH is a

neighborhood pipeline program aimed specifically at GUC residents to backfill entry level positions in three areas of need identified by UH: Patient Transport, Nutrition Services, and Environmental Services. Outreach was conducted by Famicos Foundation, Neighborhood Connections, University Circle, Inc., Cuyahoga Metropolitan Housing Authority, Fairfax Renaissance Community Development Corporation, and Burton Bell Carr Community Development Corporation. Towards Employment conducts the screening and training program for neighborhood residents while UH committed to providing preferred hiring status to candidates that successfully completed the training. The pilot program in 2013 included three cohorts; resulted in 28 people being hired from the GUC neighborhoods with an average retention rate after 90 days of 96%.

With support from The Cleveland Foundation in 2014, TE was able to continue the program. In June of 2014 they began one year of programming that will result in six additional cohorts and 60 neighborhood residents placed into Environmental Services or Nutrition Services positions at UH. The neighborhood outreach process has evolved since the pilot. While NC has been a partner on this project since the pilot, they now receive funding and are able to provide more formal outreach services. NC markets this opportunity to residents and coordinates information sessions in the community. Working with NC as a single intermediary is far more efficient than attempting to coordinate independently with each CDC. During 2014, Step Up to UH held training for 4 cohorts, which led to 34 new hires (Table 5). The 90-day retention rates for the first two cohorts were 89% and 75%, respectively. Information about the achievements of the full year (July 2014-June 2015) will appear in the 2015 evaluation report.

**Table 5: Step Up to UH performance in 2014**

	Work Start	Number of Hires	30-Day Retention	90-Day Retention
<b>TCF Cohort 1</b>	July 2014	9	100%	89%
<b>TCF Cohort 2</b>	August 2014	4	100%	75%
<b>TCF Cohort 3</b>	September – October 2014	11	100%	
<b>TCF Cohort 4</b>	November – December 2014	10		
	<b>Total</b>	<b>34</b>		

Building on the success of this program, TE is pursuing opportunities for model replication. For example, the Slavic Village neighborhood is interested in exploring a manufacturing sector neighborhood pipeline through TE's WorkAdvance initiative. Cleveland Neighborhood Progress is looking at replicating the program on the near west side of Cleveland with Metro Health as the anchor partner.

In 2014, the Cleveland Clinic launched the "**Welcome to Fairfax**" program, creating a formal presence in the community to hire GUC residents. The program received one year of funding from United Way Services and began operating in August 2014. Housed at the Fairfax Renaissance Development Corporation, it gives priority to people who enter the Clinic's hiring

website through a designated portal which can be accessed at Fairfax or from a person’s home. The goal is to place 50 local neighborhood residents in full time, entry-level positions at the Clinic’s main campus within one year. A person can apply once for all positions across the system. All new hires through this program will receive supportive services, financial literacy training, computer training, resume preparation and interviewing skills from Fairfax staff. They will also participate in educational information sessions provided by Cleveland Clinic hiring managers and job recruiters. Fairfax had 1.5 staff persons assigned to the program, one of which is a dedicated solely to the program.

Residents who need more assistance to be “job ready” are referred to TE. Recruiting is managed by Fairfax with partner organizations including PNC, other community development corporations, churches, and work readiness programs. Various avenues are being used to spread the word in the neighborhoods about opportunities to work at the Clinic. Applicants can also be referred to positions with other employers in the area. As of December 2014, there were 30 people in the pipeline. Fairfax will track hiring and retention. The Clinic sees the program as closely aligned with GUC goals and if the pilot goes well, the hope is to replicate it in other neighborhoods.

### EMPLOYING CLEVELANDERS THROUGH EVERGREEN

The three Evergreen cooperatives have a total of 84 employees<sup>13</sup>. All together, the Evergreen companies, the ECC, and Evergreen Business Services employ 91 people. One of the ECC’s goals is to provide living-wage jobs with benefits for GUC residents. An analysis of employee place of residence found that the majority, 73% (66) live in the City of Cleveland (Table 6). However, only 16% (15) live in the target GUC neighborhoods. It should be noted that none of the employees live in the Fairfax, Hough, or University neighborhoods. Figures 1 and 2 show where the cooperative employees lived in 2014.

**Table 6: Residential Location of Cooperative Employees, 2014**

Geography	Employees	%
GUCI <sup>14</sup>	15	16%
Cleveland	66	73%
Cuyahoga	84	92%
NEO	90	99%
Ohio	90	99%
Outside Ohio	1	1%
<b>Total</b>	<b>91</b>	

<sup>13</sup> As of February 2015; data provided by ECC

<sup>14</sup> The GUCI neighborhood is comprised of 6 Statistical Planning Areas (SPAs), and the City of East Cleveland



Figure 1: Cooperative Employees Living in the GUC Neighborhoods, 2014

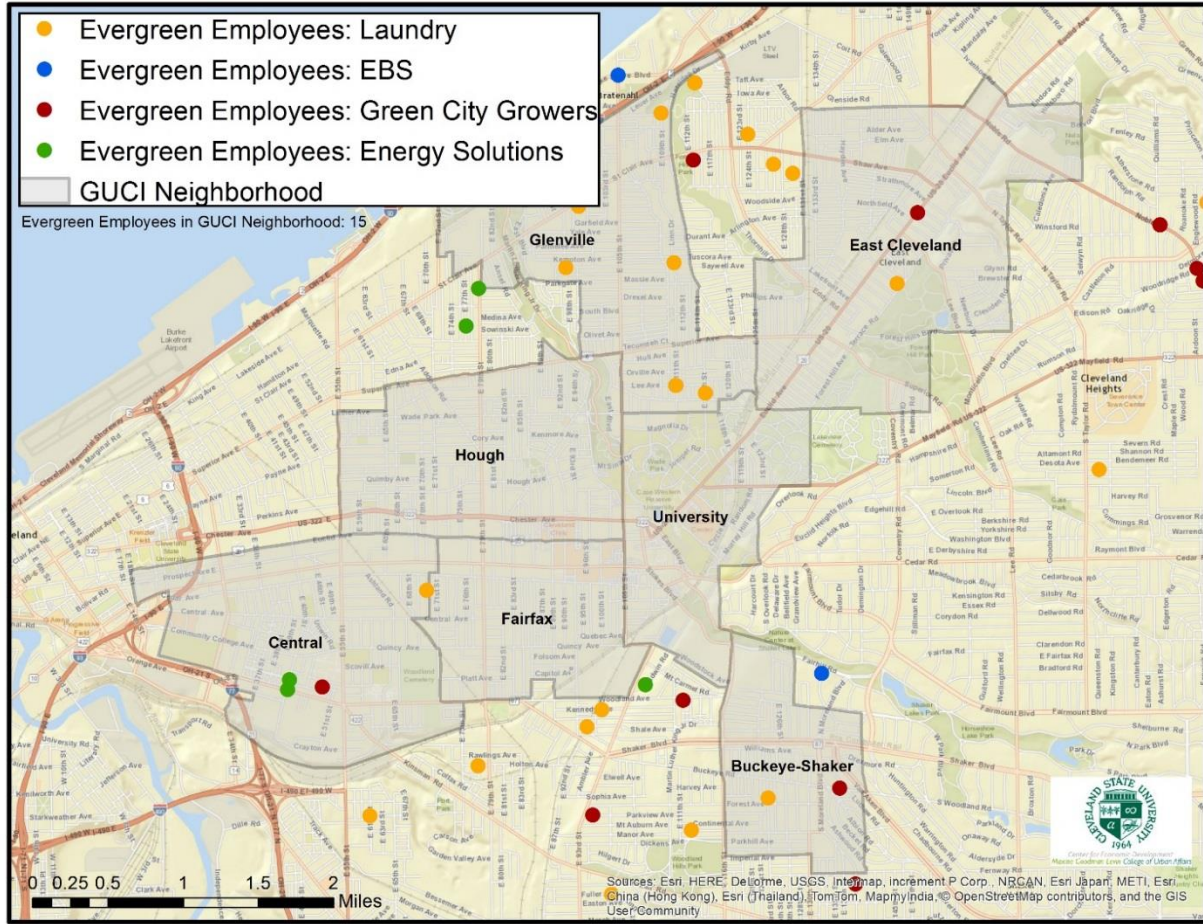
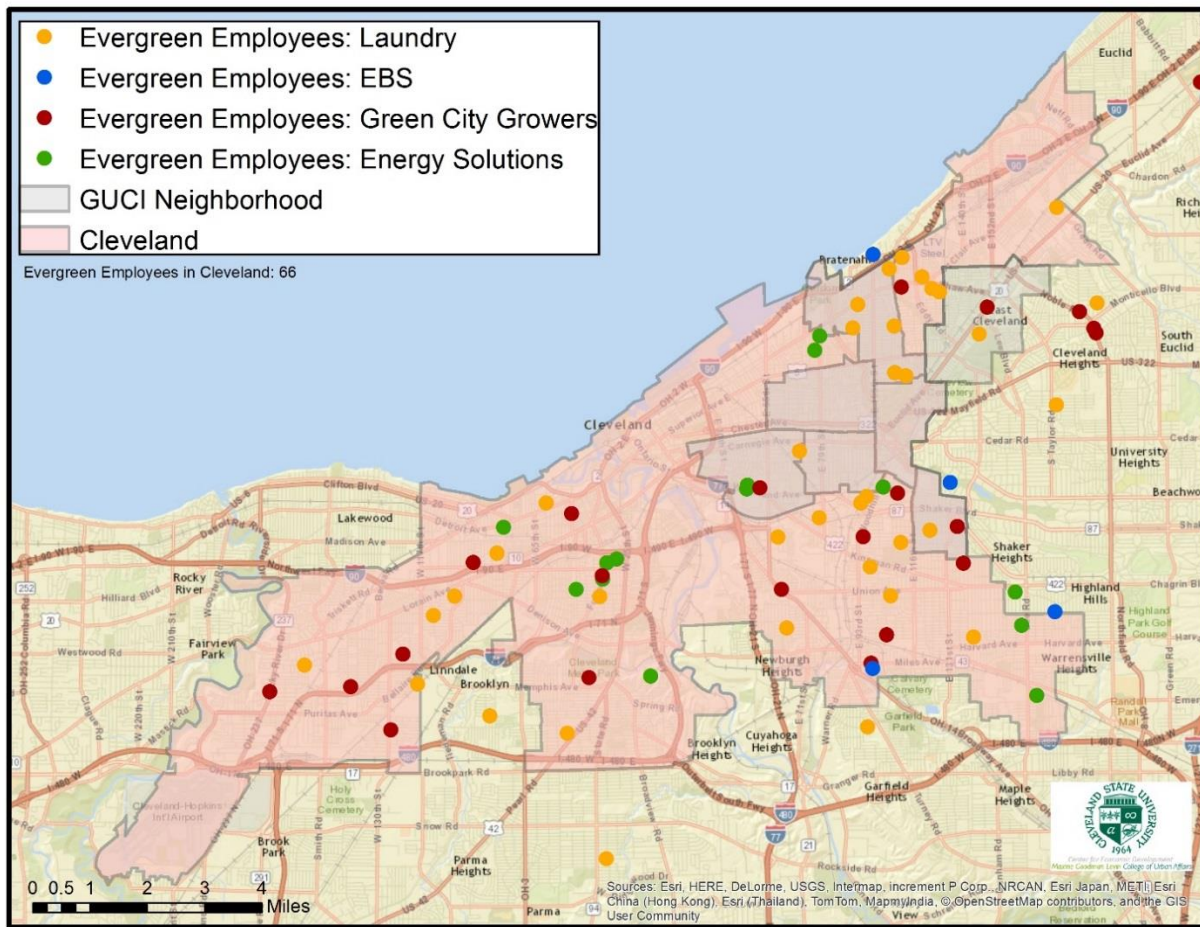


Figure 2: Cooperative Employees Living in Cleveland and East Cleveland, 2014



The breakdown of Greater University Circle (GUC) place of residence by cooperative can be found in Table 7. As the table illustrates, no EBS employees live in the GUC neighborhoods, and only two of fourteen Evergreen Energy Solutions employees live there. Only 12.9% of Green City Growers employees live in GUCI. The Laundry employs the highest share of GUC residents, with 9 of the 39 employees (23.1%) living in GUC.

**Table 7: GUCI Residency by Evergreen Employer**

Cooperative	Total		
	Total	In GUCI	% GUCI
Laundry	39	9	23.1%
Energy Solutions	14	2	14.3%
Green City Growers	31	4	12.9%
EBS	7	0	0.0%
<b>Total</b>	<b>91</b>	<b>15</b>	<b>16.5%</b>

### Employee-Member Demographics

The Evergreen initiative continues to grow its employment, while simultaneously stepping closer to profitability. Although they employed 91 workers in 2014, the information reported in the next three sections is based on 87 survey responses provided by Evergreen employees in late 2014.

#### Evergreen Cooperative Laundry

Of the three companies, the Evergreen Cooperative Laundry continues to employ the largest number of people (39), or just under half (46%) of all Evergreen company employees. Based on survey responses (41 responses), these employees have been with the cooperative for an average of 2.25 years and 49% did not have full-time employment before working at the cooperative.<sup>15</sup> Most of the employees are male (29, 73%) and are between ages 25-54 (31, 79%). The employees have an average household size of 3.4 people. Four of the Evergreen Cooperative Laundry employees have served in the military, 16(40%) were once incarcerated and 19 have a criminal record (46%).

Fourteen (36%) of the ECL employees own their own homes, and seven (17%) have taken advantage of the Evergreen Housing Program. Of the employees, 23 (58%) have their driver's license and two have taken advantage of the Evergreen Car Program. Eleven of the employees were receiving government assistance before working at the coop, but since working there, only six continue to receive assistance.

#### Evergreen Energy Solutions Cooperative (E2S)

E2S employs 14 people or 17% of the total employment for all three cooperatives. The average tenure with the cooperative is over two years, based on survey responses. Fifty-six percent of the employees did not have full-time employment before E2S, the majority of the employees are male, and 44% are between the ages of 25-34. The employees have an average household

<sup>15</sup> Data is based on responses from a survey of the cooperative employees administered by Evergreen staff and therefore the total number of members in each cooperative is different between sections. For example, 41 members of ECL responded to the survey, but at the end of the year, only 39 members remained with the cooperative.

size just under three. One of the E2S employees was in the military. Seven (44%) were once incarcerated and eight (50%) have a criminal record.

Six of the Evergreen Energy Solutions employees (38%) own their own homes and five have taken advantage of the Evergreen Housing Program. Ten employees (63%) have their driver's license, and two have taken advantage of the Evergreen Car Program. Five of the employees were receiving government assistance before working at the co-op, but since employment began, only two currently receive assistance.

### Green City Growers

Green City Growers (GCG) employs 31 people or 37% of the total employment for all three cooperatives. GCG added a total of nine workers since 2013. The employees have been with the cooperative an average of about one year, with 52% of them having full-time employment before working at GCG. Fifty-three percent of the employees are male and 87% of employees are between the ages of 25 and 54. The employees have an average household size of 3.6 people. Five employees were previously incarcerated and four have a criminal record.

Nine of the Green City Growers employees own their own homes and one participated in the housing program. Nineteen employees have their driver's license, but none have yet taken advantage of the Evergreen Car Program. Eleven of the employees were receiving government assistance before working at the coop, and, since starting with GCG only four receive assistance.

### **Cooperative Employee Financial Picture**

The total payroll for the cooperatives in 2014 was \$1.94 million. The cooperatives paid \$191,000 in local payroll taxes and \$156,600 in property taxes in 2014. This brings the total tax impact of the Evergreen coops to nearly \$350,000.

In 2014, Evergreen Cooperative Laundry (ECL) had an annual payroll of \$862,278 with an average hourly wage of \$10.81 (Table 8). Of ECL's 39 employees, 27 are members. There is currently \$4,213 in the employee capital account, an average of \$108 per employee.

Nine of the 14 employees of Evergreen Energy Solutions are members. They had a total payroll of \$420,151 in 2014. Hourly wages are much higher for E2S workers; the average wage is \$12.48. Currently, there is \$3,349 in in the employee capital account, an average of \$239 per employee.

Green City Growers has 31 employees in 2014, five of whom are members. Their yearly payroll is \$658,495, a 65% increase over 2013. This translates to an average wage of \$21,242 or \$10.55 per hour. Due to the recent inception of this cooperative, there is nothing in the employee capital account as of yet.

**Table 8: Evergreen Cooperative Employee Financial Overview, 2014<sup>16</sup>**

Variable	Evergreen Cooperative Laundry	Evergreen Energy Solutions	Green City Growers	Total
<b>Company Payroll (for entire year)</b>	\$862,278	\$420,151	\$658,495	\$1,940,924
<b>Number of employees</b>	39	14	31	84
<b>Number of employees owners</b>	27	9	5	41
<b>Value of benefits per month</b>	\$2,919	\$2,190	\$1,825	\$6,933
<b>Average Wage</b>	\$10.81	\$12.48	\$10.55	\$12.95
<b>Average Yearly Wage</b>	\$22,110	\$30,011	\$21,242	\$23,106
<b>Value of employee capital account</b>	\$4,213	\$3,349	\$0	\$7,562
<b>Average per employee</b>	\$108	\$239	\$0	\$90

## NEWBRIDGE CLEVELAND CENTER FOR ARTS & TECHNOLOGY

### Program Description

NewBridge Cleveland Center for Arts & Technology, located along the HTC, exposes youth to the digital arts and ceramics with after-school programs and trains unemployed and underemployed adults for careers in the healthcare sector. Two career training paths are offered for adults: pharmacy and phlebotomy technicians. Offering of training in a third career is being discussed.

The NewBridge adult programs use a market-based approach. Both of the career training paths are selected by the local anchor hospitals which are heavily involved in the curriculum design. The coursework is co-designed with the hospitals to ensure that the students are fully prepared for the workplace. The focus is on careers with good pay, health insurance, and opportunities for advancement.<sup>17</sup> Beyond coursework, the programs also include externships at health care institutions.<sup>18</sup> It is the hope of program creators and funders that after graduation from the program, the anchor institutions and other health care organizations will hire trainees.

Classes at NewBridge are offered at no cost to students. This arrangement is made possible through funding from multiple sources including KeyBank, the Lennon Trust, the Cleveland Foundation, University Hospitals Health System, the Kelvin & Eleanor Smith Foundation, and others. The Cleveland Foundation was also responsible for contributing 100% of the seed capital for NewBridge (\$3 million).

<sup>16</sup> This data was collected by Evergreen Business Services.

<sup>17</sup> <http://www.newbridgecleveland.org/about/>

<sup>18</sup> <http://www.newbridgecleveland.org/history/>

## Program Success

Since the program's inception in 2011, 127 adults have enrolled in the training programs. To date, 109 have graduated: 69 have accepted job offers, 18 are not available to work, six are working outside their field, two are enrolled in higher education, and four are currently looking for work.<sup>19</sup> Currently, there is a class of 35 in the phlebotomy program and 18 in the pharmacy technician program. Table 9 displays the figures reported by NewBridge. Participation figures and graduation numbers have rapidly increased, since 2014's numbers nearly reach 2011-2013's results combined.

Moreover, NewBridge graduates are eligible to participate in the same car program outlined in the Evergreen Cooperatives section, which helps newly trained technicians obtain access to jobs. So far, seven NewBridge graduates have taken advantage of the program.<sup>20</sup>

**Table 9: NewBridge Student and Graduate Data**

<b>Student Information</b>	<b>2014</b>	<b>2011-2013</b>
<b>Number of Students</b>	53	74
<b>Phlebotomy</b>	35	41
<b>Pharmacy Tech</b>	18	33
<b>Number of Graduates</b>	47	62
<b>Number of Grads that Accepted jobs<sup>21</sup></b>	24	45
<b>Total in Higher Ed</b>	1	1
<b>Total placed Outside Field</b>	3	3
<b>Total Grads not available for placement</b>	9	9
<b>Total looking for job<sup>22</sup></b>		4

<sup>19</sup> The status of the remaining ten graduates is unknown at this time.

<sup>20</sup>[http://www.cleveland.com/automotive/plaindealer/index.ssf/2013/08/collection\\_auto\\_group\\_encourages\\_young\\_professionals\\_to\\_drive\\_to\\_succeed.html](http://www.cleveland.com/automotive/plaindealer/index.ssf/2013/08/collection_auto_group_encourages_young_professionals_to_drive_to_succeed.html)

<sup>21</sup> NewBridge will report final employment numbers for 2014 graduates on March 30, 2015. NewBridge is an approved school with the Ohio Board of Career Colleges and Schools and defines a graduate as placed if they accept employment within 180 days of the last day of classes.

<sup>22</sup> Students for 2014 classes will have outcomes reported on March 30, 2015. The graduates in the 2011 through 2013 classes (4) were seeking employment but had not yet been placed at the conclusion of the 180 tracked days. Employment status is undetermined.

## GUICI CONTRIBUTIONS TO THE CLEVELAND/CUYAHOGA COUNTY WORKFORCE INVESTMENT BOARD (WIB)

The EIMC continued to support the strategic planning efforts of the WIB in 2014. Living Cities carry forward funds were used to support the work of a strategic planning consultant, Judy Simpson, to the local WIB. The grant was timely in that it coincided with three events that would reshape the WIB and its role in workforce development in Cleveland and Cuyahoga County:

- Congress passed the Workforce Innovation and Opportunity Act (WIOA) which replaced the Workforce Investment Act (WIA), the primary workforce legislation for 14 years. WIOA gives local WIBs substantially more responsibility for local and regional planning.
- The appointment of Grace Kilbane as new Executive Director at the local WIB. She had previously led the federal Strong Cities, Strong Communities effort at the WIB, on loan from the Department of Labor).
- The increase in local and regional interest and activity in the workforce field as businesses' needs for skilled workers are seen as a critical issue for the region's economic competitiveness.

In August 2014 the WIB Board created a strategic planning committee with two subcommittees: The *WIOA Policy Group* and the *External Input Group*. The *WIOA Policy Group* reviewed the new WIOA to better understand the provisions of the law, its implications for future WIB structure and function, and its opportunities, challenges and requirements. The role of the *External Input Group*, was to determine the strategic implications for the WIB and to provide input to the planning process. Group members interviewed 17 civic leaders involved in workforce development funding, planning, and programming and analyzed these data to shed light on the strategic direction of the WIB.

On November 20, the WIB Board members participated in a facilitated retreat designed to elicit their vision for the future direction of the WIB. The board agreed that a future WIB will assume a greater public leadership role in workforce research, planning, and coordination in Greater Cleveland; utilize technology and communications/public relations to enhance its visibility; and will seek and facilitate strategic partnership opportunities across the region. Using this expanded vision as a guide, the strategic planning work in the first half of 2015 will focus on four tasks: adopting new goals and strategies, creating the local workforce plan mandated by WIOA, amplifying the WIB's visibility, and identifying and implementing structural changes to the WIB that position it to achieve its leadership role regarding workforce.

The WIB's new strategic plan is expected to provide Cleveland and Cuyahoga County more coordination of workforce planning and research; serve as a neutral "table" where multiple organizations working on workforce issues gather to achieve greater alignment and leveraging of resources and activities; collaborate with businesses and others on sector strategies and career pathways to expand career technical training; work with employers and educators on needed "talent pipelines" to meet projected workers and skills shortages; and, ensure the

“demand-facing” service delivery model of the public workforce system continues to maximize its opportunities to provide employment and training services.

Towards Employment (TE) is applying the lessons learned related to neighborhood recruitment for targeted jobs from the pilot program, Step Up to UH, to other jobs within UH (Patient Care Assistants, sterilization and Environmental Services) as well as to other programs such as Work Advance (manufacturing). For example, TE applied the lessons it learned about how to work with employers and how to structure support for incumbent workers, to a training program for incumbent workers in a welding program at Lakeland Community College. The participating employer reorganized the work schedule for employees to allow for training and provides all materials, but it does not pay for the training. TE is looking to recruit new employees to fill the newly opened entry-level positions from neighborhoods around the employer’s South Euclid location.



## LIVE LOCAL

In addition to the housing program offered to Evergreen employees described in earlier sections, the main program that addresses the goal of live local is the Greater Circle Living (GCL). The Cleveland Foundation awarded \$445,000 for initiatives working on the Live Local goal in 2014. However, this amount includes a grant of \$350,000 to Famicos Foundation for Circle North redevelopment, acquisition, and rehabilitation which may be spent over a 5 year period.

### GREATER CIRCLE LIVING PROGRAM DESCRIPTION

Greater Circle Living (GCL) is an employee housing assistance program for people working for the anchor institutions and other nonprofits in the Greater University Circle area. Participating employers offer incentives to their employees to encourage them to live in the GUC neighborhoods. Funds are provided by each participating organization<sup>23</sup> with additional support from the Cleveland Foundation. Fairfax Renaissance Development Corporation and University Circle, Inc. administer the program. The program offers forgivable loans to improve access to affordable housing, assist individuals in building wealth, reduce commute times and costs, and enhance quality of life by offering employees of eligible institutions an opportunity to live and work close to world-class cultural institutions and services.<sup>24</sup>

The program offers forgivable loans on owner-occupied home purchases by full-time employees. In addition, employees are eligible for matching funds for exterior renovations, or one month's rental payment.

### GCL PROGRAM SUCCESS

Approximately \$2.6 million of incentives were awarded through the GCL since the program's inception in 2008. These incentives have leveraged an additional \$13.2 million in Greater University Circle through home purchase, home improvement, and rental assistance programs, a 500% community return on investment. A total of 241 employees have received funding through the program to date. In June 2012, a new memorandum of understanding (MOU) was signed with the University Circle nonprofits, which changed and relaxed the rules surrounding the GCL program. This report tracks program utilization during two phases of the program: phase one (May 2008- May 2012) and phase two (June 2012 – December 2014). The new MOU has greatly increased employee participation. Eighty-six employees received funding in the first phase of the program and 155 employees received funding since the re-launch. An overall description of the program utilization is in Table 10.

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<sup>23</sup> Cleveland Clinic, University Hospitals, the Cleveland Museum of Art, Judson at University Circle and Case Western Reserve University

<sup>24</sup> <http://www.fairfaxrenaissance.org/gcl/index.html>

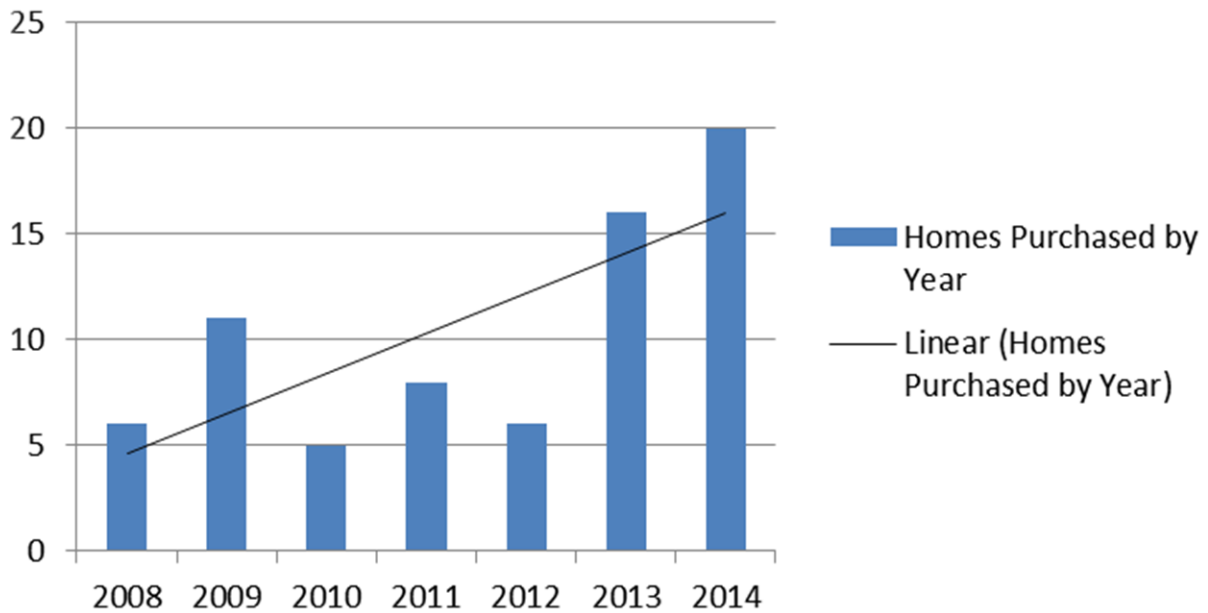
**Table 10: GCL Program Participation by Phase**

	Phase I 2008-2011	Phase II 2012-2014	Total period 2008-2014
Purchase	31	41	72
Rent	37	99	136
Rehabilitation	19	14	33
<b>Total</b>	<b>87</b>	<b>154</b>	<b>241</b>

**Home Purchase Assistance**

Since 2008, 72 employees have received Greater Circle Living funds to purchase homes, including 20 in 2014 (previous highs were 16 in 2013 and 11 in 2009) (Figure 3). Purchase price has ranged from \$16,000 to \$549,000. Employee household income has ranged from \$17,500 to \$486,000, with an average of \$91,065. In 2014, the average purchase price was low compared to previous years, coming in at just below \$150,000. The lower average purchase price did not impact the record pace of total sales by year, a number approaching \$3 million.

**Figure 3 Greater Circle Living Homes Purchased by Year**



**Rental Assistance**

A total of 136 employees have received rental assistance from GCL, which provides a one month rental payment. The more flexible eligibility criteria for rental assistance have quadrupled the average annual usage of the program in phase II from phase I (Figure xx). The number of people receiving rental assistance grew from 37 in 2008-2011 to 99 in 2013-2014.

The household income of program recipients ranged from \$20,000 to \$300,000, with an average of \$69,904.

**Program Usage by Employer**

Of the three anchor institutions participating in Greater Circle Living, the Cleveland Clinic and University Hospitals provide the lion’s share of subsidies. The Clinic and University Hospitals have each provided subsidies to 89 employees, as shown in Table 11. The Clinic has had the highest total employees participate in the home purchase program, at 28, while UH has had the highest participation in the rental program, at 58 employees. CWRU has assisted an impressive total of 48 employees, given their institution’s size compared to the hospital systems. All other employers in University Circle have assisted a total of 15 employees, mostly through the home purchase assistance program (12 participants).

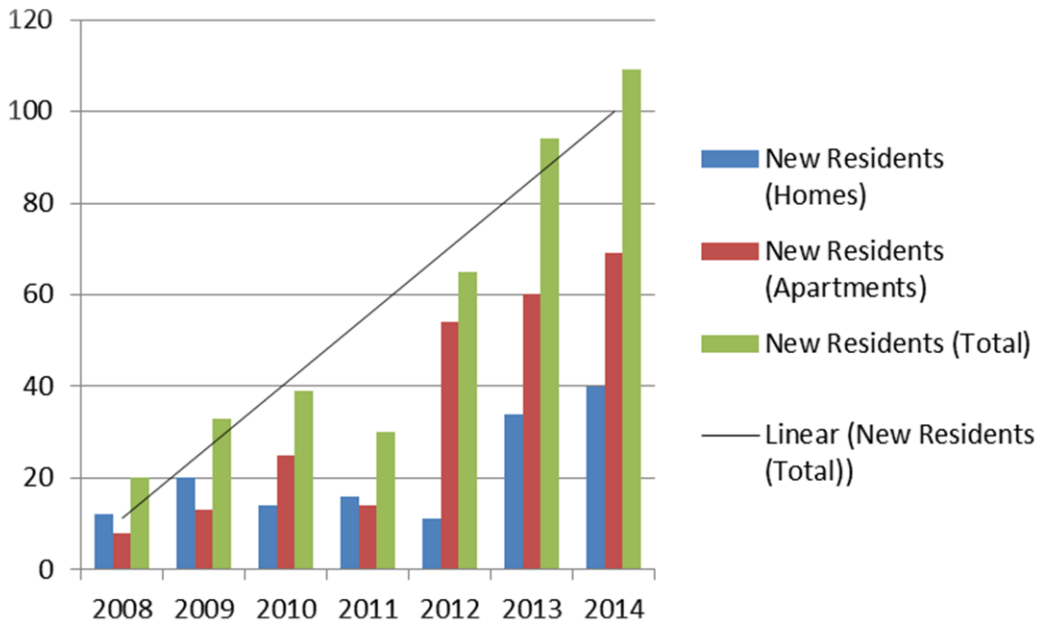
**Table 11: GCL Program Participation by Institution**

	Cleveland Clinic	Case Western Reserve University	University Hospitals	Other GUC Institutions	Total
Purchase	28	15	17	12	72
Rent	50	27	58	1	136
Rehabilitation	11	6	14	2	33
<b>Total</b>	<b>89</b>	<b>48</b>	<b>89</b>	<b>15</b>	<b>241</b>

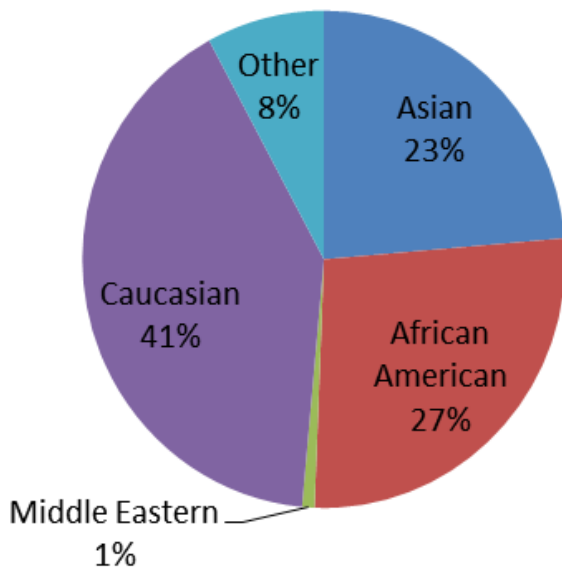
**Increasing the Greater University Circle Population**

The Greater Circle Living program is successfully increasing the population of anchor institution employees who live in Greater University Circle (Figure 4). Including family members, the program has supported 422 new residents in these neighborhoods. Eighty-two percent of these residents moved from outside Greater University Circle to University Circle. Participants are diverse, with 27% identifying as African American, 23% identifying as Asian, 1% identifying as Middle Eastern, and 8% identifying as other non-Caucasian (Figure 5). Participants represent 25 states, at least 27 cities and six international relocations.

**Figure 4: Total Greater Circle Living Program Usage by Year**



**Figure 5: Greater Circle Living Program Diversity**



Also under consideration is an expansion of the geographic boundaries of the Greater Circle Living program north to the lake and west, to coincide more closely with the GUC neighborhood boundaries. The expansion was proposed to offer more housing choices along East Boulevard and MLK, to strengthen the Rockefeller Park neighborhoods, and creating a stronger gateway to the circle from the north and west. Each anchor would have to approve any expanded boundaries to the GCL program.

## CONNECT

The goal of the EIMC's community engagement work is to connect residents from different neighborhoods and backgrounds with each other and with the anchor institutions and to strengthen the resiliency of residents and the neighborhoods in which they live. This work is closely tied to the Live Local goal and forms the foundation for providing neighborhood residents with access to jobs, building wealth and sustaining that wealth over time. Connecting residents is a way to spark social innovation leading to system change.

### NEIGHBORHOOD CONNECTIONS

Neighborhood Connections (NC) is the lead organization for connecting residents. NC has been described by many of the stakeholders as the glue that holds much of the EIMC's work together. The Cleveland Foundation awarded \$1.1 million to NC for their community engagement work and small grant program.

In 2014, NC had three interconnected strategies for its work with the EIMC:

- Build and expand the Neighbor Up Network within and beyond Greater University Circle using stories and data to document successes within the network.
- Strengthen and build on successful pilot initiatives (StepUp to UH, Greater University Circle Community Health, City Repair, Innovative Grantmaking, discussions on race, neighborhood organizing) while developing indigenous leadership in these initiatives to carry on this work.
- Continue the small grants program for resident led projects, including supporting ideas and projects in the GUC neighborhoods that are generated through the Neighbor Up network.

### Neighbor Up Network

The Neighbor Up Network continues to be the centerpiece of NC work in the GUC. The network has over 500 registered members and 1500 participants. Monthly Neighbor Night meetings regularly attract more than 100 people. Attendees can participate in the Marketplace (a timed event to make an offer, a request or a proclamation), a speed-dating exercise to connect people with jobs, and Community Conversations. As a result, participants have engaged in 750 acts of mutual support as a result. Participants come from Greater University Circle neighborhoods and beyond. They are diverse in age, race, gender and income, and include institutional representatives as well as neighborhood residents.

### Program Initiatives

NC continued to work with anchor institutions, Community Development Corporations and universities to connect residents with opportunities. Current initiatives in the GUC neighborhoods fall into two types, place making and neighborhood grants.

## **Place-Making Activities**

Examples of place-making activities include the Circle North and City Repair.

**Circle North**: Circle North was launched in 2013 as a concentrated community development effort in a two-square block area of the Wade Park neighborhood, immediately north of University Circle.<sup>25</sup> The effort aims to build community, provide residents increased access to resources and opportunities, beautify the neighborhood, and address issues identified by residents. NC works with other community partners including the Famicos Foundation, a community development organization serving this area, University Circle, Inc., a community service organization, Case Western Reserve University (CWRU), the Veterans Administration (VA) and the City of Cleveland.

Accomplishments to date include:

- NC convened several safety meetings with the various police departments working in the area (City of Cleveland, CWRU, UCI, VA). The Cleveland Police Department recently assigned a community officer for Ward 9 which includes Circle North.
- Residents have increased access to services offered by Famicos, NC and City of Cleveland.
- A resident core team, comprised of 17 Street Captains, coordinated a neighborhood watch and other safety strategies and worked with community partners to mobilize and make decisions impacting the neighborhood.
- Rebuilding Together, a national volunteer organization, recruited over 100 volunteers to work with residents to repair homes on E. 120<sup>th</sup> St., and create a small park at the corner of E. 116<sup>th</sup> St. and Kelton.
- A summer youth landscaping program completed its second year. It successfully employed 40 youth age 10 and up and improved the area.
- Through the housing acquisition and rehabilitation program, 13 homes were acquired and rehabbed, 10 were sold.

**City Repair**: City Repair Cleveland is a neighbor-led place making initiative that beautifies neighborhoods, strengthens community relationships, and inspires shared stewardship amongst people right where they live. In the Larchmere-Buckeye-Shaker Square neighborhood, residents acknowledged the disconnect and racial tension between their communities and undertook a mural project to bridge the divide. The project resulted in new cross-neighborhood friendships, community poetry workshops, design parties attracting hundreds of residents, and a mural in the Buckeye area. City Repair programs are underway in two west side neighborhoods as well. One broad scale impact of the work was the introduction of legislation in the City of Cleveland to allow community members to paint their streets.

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<sup>25</sup> Circle North runs from E. 116<sup>th</sup> to E. 120<sup>th</sup> and from Ashbury to Kelton.

**Healthy Communities:** The Greater University Circle Community Health Initiative brought together the CWRU Medical School, NC, and residents to begin to address health disparities in the eight GUC neighborhoods. Even more promising, UH and Cleveland Clinic are exploring ways to partner with NC on this initiative.

### Neighborhood Grants

In fall of 2014, 58 NC grants were approved for resident-led projects in GUC totaling \$175,000. Inspired by the NC small grants program, University Hospitals reached out to NC to help them launch their own small grant program (\$25,000) for community organizations to focus on health- and wellness-related activities in the GUC neighborhoods. NC identified social service agencies to apply for the grants. The program, launched in 2014, is a pilot to help UH meet its community benefits responsibility under the Affordable Care Act.<sup>26</sup> NC was a logical partner, based on their previous positive experience working together on StepUp to UH and the health hubs project.

If the pilot goes well, the program could be expanded in the future to neighborhoods surrounding other medical facilities within the UH Health care system. UH has developed a set of metrics to demonstrate impact. Heidi Gartland, Vice President for Government Affairs at UH credits her participation in the EIMC for generating the idea to pilot the program in the GUC area, and not somewhere else in Northeast Ohio. She views it as way to benefit patients, serve the community and meet the needs identified in the health assessment.

### Neighborhood Voice

*Neighborhood Voice (NV)* is a community newspaper and website serving University Circle and the surrounding communities. *NV* began publishing in September of 2010 with the intent of informing and inspiring the residents, organizations, and businesses of GUC by providing a forum for the exchange of information and ideas. *NV* also connects with residents and institutional readers through their responsive website which can be viewed via a mobile phone or computer.

To reduce costs in 2014, the hard copy publication schedule changed from monthly to semi-annual. In addition, Lila Mills, *NV* editor, was named Communications Manager of NC and given additional responsibilities for overall communications. As the focus of *NV* shifted from news and information sharing to a “story capture” mode, it made sense to rely more on the website as the primary communication vehicle. It could be frequently updated to develop, capture and share stories of people and place in the GUC.

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<sup>26</sup> Section 9007 of The Patient Protection and Affordable Care Act (ACA) revises the federal tax-exempt status requirements for nonprofit hospitals, to assure that hospitals’ “community benefit” investments (a condition of their tax-exempt status) are transparent, concrete, measurable, and both responsive and accountable to identified community need. To this end, the ACA requires hospitals to conduct a “community health needs assessment” (CHNA) and to adopt an “Implementation Strategy.”

## ANCHOR-BASED COMMUNITY ENGAGEMENT

In addition, the anchor institutions have deepened their involvement in the community as a result of participating in the EIMC, especially where community interests align with their internal goals. Both the Cleveland Clinic and University Hospitals cited examples of how their involvement in EIMC is influencing their internal practices that benefit the community.

For example, the Cleveland Clinic has three internal goals that align with the overall initiative: economic development, health and wellness, and civic education. They have made a system wide decision to invest in community development programs where their facilities are located. They have a strong, commitment to Cleveland, coming from the top leadership of the organization. The commitment ranges from improving the school system to bringing more people into the city. Cleveland is in their name and they are not moving. Another internal goal that aligns with EIMC is an increased focus on community health initiatives. This will improve the ways they serve people with chronic ailments, not only in Cleveland but in all the communities in which they have facilities.

However, the Clinic's leadership recognizes that they cannot engage in community development on their own and that partnerships are key. Partnerships, such as those with NewBridge and Fairfax Renaissance Development Corporation, are especially critical, especially to for increasing the share of new hires that come from the surrounding community. As part of their strategy to strengthen ties to the communities they serve, they are conducting a baseline study to determine what the community thinks of them and why. They hope to discover how to leverage the CCF brand to improve the quality of life of the people in their own backyard. Further, in 2014, the Clinic hired Vickie Eaton Johnson, as the senior director of community relations at the Cleveland Clinic. Johnson had formerly been the Executive Director of the Fairfax Renaissance Development Corporation and her role at the Clinic will be to strengthen ties to the community. The Clinic embarked on a community resiliency project designed to provide power to the Clinic in case of climate or other disaster. The plan includes the addition of a new power station. The Clinic extended the reach of the power station to provide power to the neighborhood as well as to the Clinic campus in case of emergency.

University Hospitals is also drawing on the lessons learned from participating in the EIMC to inform programs in all the communities they serve. One of UH leaders indicated that StepUP to UH is a community benefit priority and is one of the best sources of inspiration and innovation for other community programming.

The three anchors work together on community health and security. For example, the two health systems provided health screenings and health information at Wade Oval Wednesdays. Together, they are working on the infant mortality issue with CWRU, UCI, Rainbow, the city of Cleveland's Health Department and the March of Dimes. Collaboration around this issue is the key to understanding the underlying issue of the high number of infant deaths in the neighborhoods.



Another community initiative that the anchors work together is around security. Starting in 2013 The Clinic, Fairfax Renaissance Development Corporation, UH, the City of Cleveland, CWRU, CMSD, the County Sherriff and RTA police meet together once a year to improve safety.