

# THE CLEVELAND FOUNDATION

Report to the Community 2006



the cleveland foundation: a snapshot

Established in 1914, The Cleveland Foundation is the world’s first community foundation. Today we are the third-largest community foundation in America.

Mission

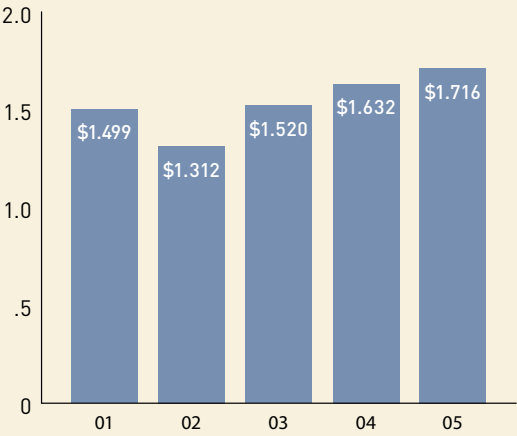
The mission of The Cleveland Foundation is to enhance the lives of all residents of Greater Cleveland, now and for generations to come, by building community endowment, addressing needs through grantmaking and providing leadership on key community issues.

Stewardship

Assets year-end 2005: \$1.7 billion  
Grants authorized in 2005: 2,800, ranging from a few hundred dollars to \$5 million  
Value of grants awarded in 2005: \$85 million  
New gifts received in 2005: \$29 million  
Operating expenses in 2005: \$9.8 million  
Number of employees as of June 1, 2006: 61

Growth of the Endowment

Total Assets (dollars in billions)



Grantmaking

The Cleveland Foundation awards most of its grants to 501(c)(3) nonprofit organizations. Some grants are made to government agencies. Grants support Greater Cleveland projects and programs that benefit its citizens, meet community needs and test new ideas. The Foundation generally does not make grants to individuals, for-profit organizations, small businesses, endowment campaigns, annual fundraising or membership drives. For complete information about grantmaking, please visit our website. There you will find a list of grants awarded in 2005, and information about how to apply for a grant, including eligibility and priority areas for grantmaking.

Philanthropy

The Cleveland Foundation would not exist today were it not for the extraordinary generosity and vision of our donors. The Foundation offers numerous creative and rewarding ways to donate to the community, some with significant tax advantages. We encourage prospective donors to contact either the Foundation directly or a professional advisor to learn more about philanthropic opportunities.

Steven A. Minter Conference Center

The Cleveland Foundation’s Steven A. Minter Conference Center is available for use by nonprofit organizations, professional associations and government agencies. It accommodates up to 85 and includes state-of-the-art audiovisual equipment. It is available, free of charge, Monday through Friday, 8:30 a.m. – 4 p.m. Call our conference coordinator at 216.861.3810 for further information.

To learn more about The Cleveland Foundation

Please contact us at the address below or visit our website.  
The Cleveland Foundation  
1422 Euclid Avenue, Suite 1300  
Cleveland, Ohio 44115-2001  
Phone: 216.861.3810  
www.clevelandfoundation.org

LEADERSHIP

Last year, our endowment was worth more than \$1.7 billion. We received more than \$29 million in gifts. We awarded more than \$85 million in grants. However, we believe that the true measure of the Foundation’s worth is not the size of our endowment, nor how much we receive in gifts, nor the dollar value of our grants. Rather, we believe that the true measure of our worth is the leadership role we play and the impact we have in the communities we serve.

By that measure, are we succeeding?

Dear Friends,

Those who read our annual report regularly will notice a change in our title. We’ve moved away from calling it an annual report – a history of the prior year – to calling it a report to the community. The name change is more than cosmetic. We want it to be both retrospective and prospective, informing you of our 2005 accomplishments and, just as important, sharing with you our future plans.

You may already be familiar with our mission. It is to enhance the lives of all residents of Greater Cleveland, now and for generations to come, by

- › Building community endowment
- › Addressing needs through grantmaking
- › Providing leadership on key community issues

While this report to the community will address each of these important components of our mission, this year’s report will emphasize one in particular – leadership.

Last year our endowment was worth more than \$1.7 billion. We received more than \$29 million in gifts. We awarded more than \$85 million in grants, the second-highest level in our history. We awarded more than 2,800 grants, ranging from a few hundred dollars to \$5 million.

We believe, however, that the true measure of the Foundation’s worth is not the size of our endowment, nor how much we receive in gifts, nor the dollar value of our grants.

Rather, we believe that the true measure of our worth is the leadership role we play and the impact we have in the communities we serve.

By that measure, are we succeeding?  
We believe the answer is yes.

A foundation our size in a community our size is obliged to do more than simply build endowment and award grants. We have the financial and human resources to provide thoughtful leadership not only on the issues of today, but of tomorrow as well.

Bold philanthropic leadership is critical for a region like Greater Cleveland, which is undergoing an enormous transformation as it seeks to regain its rightful place as one of America’s great places to live and work. As you read through this report to the community, you will see time and again where we are playing a leadership role.

The Cleveland Foundation itself has been evolving over the past decade. Increasingly, we seek to be more proactive in identifying and anticipating community needs. With the strong support of our board of directors, we now proactively direct the majority of our

grant dollars toward what we have identified as the community’s five greatest needs:

- › Economic transformation
- › Public school improvement
- › Early childhood development
- › Neighborhoods and housing
- › Arts advancement

We award the balance in response to direct requests from the community. These responsive grants support the priority areas mentioned above as well as others, including

- › Human Services
- › Health
- › Environment

As we look ahead, leadership also means that in future years you can expect to see The Cleveland Foundation take thoughtful, nonpartisan positions on issues of public policy – a role fully in keeping with our stated mission of “providing leadership on key community issues.” We expect to collaborate with like-minded institutions, foundations, civic and corporate leaders, and public officials. Some issues are of such magnitude that changes in public policy must be made if the community’s critical needs are to be met.

We also subscribe to the belief that leadership begins at home. Here at The Cleveland Foundation, we practice what we preach:

- › We strive to demonstrate our commitment to diversity in all that we do.
- › We believe strongly in transparency. We want our community to understand how and why we make decisions.
- › We aim to be a leader in client service. If you come to us for a grant, we want to be as accessible and helpful as possible.

No discussion of leadership would be complete in this report to the community without paying tribute to two exemplary leaders, former board chairman Jack Sherwin, and Alex Machaskee. They retired from our board of directors in 2006, having completed 10 years of dedicated service to the Foundation. In addition, we want to recognize two exceptional program directors who also are retiring this year, Goldie Alvis (human services) and Jay Talbot (neighborhoods and housing), each of whom devoted more than 20 years of outstanding service to the Foundation and the community.

Finally, we wish to express our great appreciation to the entire staff of The Cleveland Foundation. It is their hard work, day in and day out, and their commitment to our donors, our grantees and all of Greater Cleveland that enables us to fulfill our mission.

*Jacqueline Woods* *Ronald B. Richard*  
**Jacqueline F. Woods** **Ronald B. Richard**

Chair, Board of Directors President and Chief Executive Officer

June 2006



Jackie Woods and Ronn Richard witnessed the new wind turbine at the Great Lakes Science Center come to fruition in May 2006 with the help of a grant from The Cleveland Foundation. The wind turbine is a tangible symbol of both the potential of renewable energy and the prospect of building an industry in Northeast Ohio to meet rising global demand. Two years earlier, before the importance of alternative energy had made headlines throughout the nation, the Foundation supported a number of initiatives related to advanced energy and was the first to call for creating an advanced energy industry for the region.



## foundations of LEADERSHIP

by Ronald B. Richard, President and Chief Executive Officer

There is no substitute for leadership. With it, almost anything is possible. Without it, success is achieved only by dint of luck and in the rarest of circumstances.

Today, Greater Cleveland and the nation face extreme challenges on multiple fronts: the plight of urban public education, the effects of globalization on our economy, persistent poverty, environmental degradation, the decline of manufacturing and with it the decline of relatively well-paying and stable jobs for our labor force, the aging of a large portion of our population, the skyrocketing cost of health care, and the list goes on.

To solve these complex and urgent problems, our need for strong leadership has never been greater nor have the stakes been higher.

It has become increasingly evident that we cannot expect Washington to solve Greater Cleveland's problems. We must take the lead in solving them, which calls for vision and leadership here and now. However, our first-class public officials, and business and civic leaders are extremely busy. Their jobs are more complex than ever, requiring them to focus on the immediate problems of the day or on quarterly results, and often taking them away from Cleveland on global travel. Despite this reality, it is admirable that so many still find time to engage heavily in a broad array of charitable activities.

Who has time to examine the big picture? Who has the luxury to think long-term strategy for the region? Who has the bandwidth to focus on the greater good of the community?

Community foundations such as ours, working with other local philanthropies and public and private partners, are in a unique position to address broad community issues. We can help the city, county and state explore long-term approaches to major problems. We can learn from our peers at charitable foundations around the country about which innovative, regional approaches worked and which did not.

We can plant the seeds of new ideas. If we do our job well, what we plant today will grow into a more vibrant, inclusive, regional economy and a just society, with more jobs, far better education for our youth, and stronger leadership in the public, private and nonprofit sectors.

Last year, The Cleveland Foundation articulated a near-term vision for addressing community issues. This vision is less a departure from the past than a logical extension of the direction in which we have been heading for many years, with greater emphasis on being proactive rather than reactive in this time of heightened need.

At its core is our fundamental belief, consistent with our mission, that we must be a leader. We must step up to the plate

across the full spectrum of issues and play a leading role – if not *the* leading role – in proactively tackling many of our most challenging problems. We can lead from the front seat or the back seat – we can lead through grantmaking, facilitating, convening, partnering, mentoring or merely by example – but we *must* lead.

Also critical to our vision is impact.

In this era of shrinking state and federal funding, what is our impact on the community we serve and how do we measure it? Have our grants made a lasting difference? Have we helped our grantees achieve long-term business transformation or have we merely provided band-aid solutions to their problems? Have we truly fulfilled our mission?

To answer in the affirmative requires us to set priorities, remain focused on those priorities and make difficult choices. In the future, to have greater impact and truly make a difference, we may award fewer but larger grants – highly strategic grants with greater potential to help alleviate the region's most pressing problems.

And because resources are finite, we must constantly prioritize as we measure the value of the grants we make, always asking ourselves, "If we make this grant, will a higher priority not get funded?" In turn, this approach dictates a more proactive stance in our grantmaking.

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**Community foundations such as ours, working with other local philanthropies and public and private partners, are in a unique position to address broad community issues.**

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We also must pay more attention to public policy. Even a foundation our size, with some \$1.7 billion in assets in 2005, is limited in the impact we can make. Therefore, we must be more attentive to public policy. We must help conceive of impactful, non-partisan public policies and communicate them to our local, state and federal legislators in order to affect budget priorities.

Being so intimately involved with our community, and having the ability to see the ramifications of public policy on the ground, we can and should weigh in whenever necessary and appropriate to leverage our dollars, address policy issues, and seize opportunities.

We know, for example, that our nation will need large numbers of engineers in the future, many more than are in the pipeline today. However, only 3 percent of our college students are majoring in engineering versus more than 35 percent of students in China and India. So, 10 years from now, where would an international company like General Electric locate its aircraft research and development operations if we have a shortage of engineers? Probably not in our region or elsewhere in the United States.

We know the problem exists, but lack public policy to address it. This issue, which at first might not seem like one of concern to a community foundation, will have a profound effect on the ability

of our local companies to compete in the global marketplace of the future, so we must look at it as our issue too.

Another example is energy. As we all are aware, our nation is dangerously dependent on foreign oil, a nonrenewable resource predicted to become extremely scarce and prohibitively expensive in our lifetime, or in that of our children. Although we have known of this eventuality for some time, only now are we awakening to its implications for our nation and our region.

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**In the future, to have greater impact and truly make a difference, we may award fewer but larger grants – highly strategic grants with greater potential to help alleviate the region's most pressing problems.**

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However, unlike other nations, we lack effective policies to support development of new, advanced energy industries that could reduce our dependence on fossil fuels and unstable foreign nations, and create new and stable jobs for our work force. We must address this issue not only at the national level, but at the local level as well.

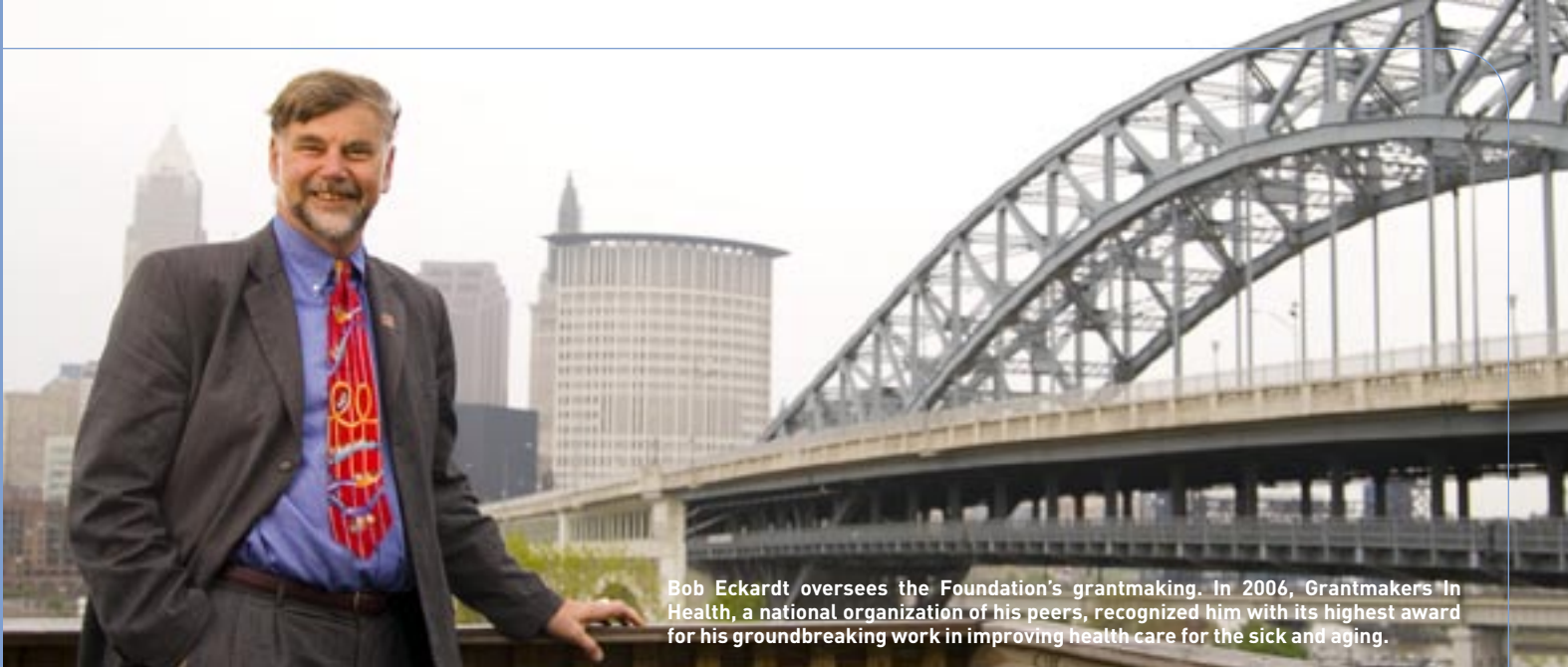
If we have a wish for the future, it is this: When future generations look back on these critical years in our region's history, they will say that the leadership and support provided by The Cleveland Foundation played a pivotal role in restoring Northeast Ohio to its rightful place as a national leader in science, technology, education and the arts.

And that at a time when our nation was caught up in a rush of geo-political events, all of us in the nonprofit world sharpened our focus to help improve the quality of life in our great city and our lovely region for the benefit of all our citizens, especially those most underserved and vulnerable.

That is our responsibility as leaders in our community.

That is our role in society.

That is the mantle that we must wear to be worthy of our founders who conceived of The Cleveland Foundation, the world's first community foundation, almost 100 years ago.



Bob Eckardt oversees the Foundation's grantmaking. In 2006, Grantmakers In Health, a national organization of his peers, recognized him with its highest award for his groundbreaking work in improving health care for the sick and aging.

## vital issues of the day

The focus of this report to the community is the leadership role of our Foundation. It is an important focus, because while foundations often are viewed largely as grantmakers, it is critical for them to be leaders.

To best meet our responsibility as a community leader, we divide our grantmaking into two categories: proactive grants addressing vital issues in the community, and responsive grants that come to us in the form of direct requests.

Proactive grantmaking starts with leadership. Our board and staff, in concert with community leaders, have identified areas of critical, ongoing and widespread need: economic transformation, public school improvement, early childhood development, neighborhoods and housing, and arts advancement. The Foundation is in a singular position to actively advance these agendas and, through thought leadership and grants, to inspire and support our community. We are in a strong position to take the long-term view, look beyond the interest of any single institution, act as a bridge between sectors, and amplify voices that need to be heard.

Responsive grantmaking is what most people are familiar with. Someone might say, "Our nonprofit organization has a demonstrated need; let's see if we can get a grant from The Cleveland Foundation to support it." These grants also are vital. They require us to listen carefully. Often, as we listen and learn, patterns of need begin to take shape, patterns that point to a larger picture and help us become better leaders.

In past years, much of our annual reporting highlighted community-responsive grants. This year, our report will focus more on Foundation-initiated programs. In the following pages, we briefly discuss ongoing initiatives in economic development,

public schools, early childhood, neighborhoods and housing, and the arts. We also report on a multiyear project completed this past year dealing with successful aging.

It is worth noting that none of these initiatives "solved" a problem. There are no easy answers to complex issues.

What we hope to convey is an understanding of how the Foundation identified significant needs and then, through the use of creative thinking and creative grantmaking, invited disparate groups to come together, often forming dynamic partnerships, to attack those problems.

In the end, it is not dollars alone that will solve our problems. It also takes thoughtful leadership and thought leadership to make a true difference.

**Robert E. Eckardt, Dr. P.H.**

Senior Vice President for Programs and Evaluation



Brad Whitehead, program director for economic development, and Richard Stuebi, BP fellow for energy and environmental advancement, at new, environmentally friendly dormitories on the campus of Case Western Reserve University. University Circle is an important target of the Foundation's economic development agenda, as are energy and environmental solutions.

## leadership on vital issues

If we are to best fulfill our mission, it is incumbent upon The Cleveland Foundation to work toward achieving long-term solutions to many of the larger, more persistent issues facing Greater Cleveland. Our board of directors has identified priority areas that now receive significant board attention, staff time, and financial commitments. They represent issues vital to the long-term well-being of Greater Cleveland: a vibrant economy, respected public schools, healthy children, strong neighborhoods, a thriving arts community, and a caring environment for our older citizens. Through proactive grantmaking, as described on the following pages, we are taking a leadership role by initiating and supporting programs that will "enhance the lives of all residents of Greater Cleveland, now and for generations to come."

## economic transformation

The Cleveland Foundation's goal for economic transformation is anything but modest. We aim to take a leadership role in restyling Greater Cleveland's economy from one battered by global forces to one that excels in the global marketplace.

We believe that a regional, long-term, collaborative strategy can restore and strengthen our economy. To that end, between 2003 and 2005, the Foundation awarded more than \$20 million in grants and is committed to ongoing support for economic development initiatives. In the work of our grantees, we see signs of progress. The Civic Innovation Lab is providing seed money to grow entrepreneurial ideas into successful civic ventures. JumpStart and BioEnterprise are launching new companies. Voices & Choices is fostering unprecedented civic engagement.

Our collaborations embrace the business, civic, public, research and philanthropic sectors. To contribute the greatest value, our focus is on supporting endeavors that address the following priorities:

- › Building economy-boosting industries in the region, primarily through our close relationship with the Fund for Our Economic Future, a dynamic collaborative of some 80 philanthropic institutions with a shared goal: to make Northeast Ohio globally competitive.
- › Supporting a thriving urban core by working closely with leadership at City Hall, Case Western Reserve University, and University Circle to accelerate development in downtown Cleveland, University Circle, and our neighborhoods.
- › Developing an advanced energy industry. This major commitment on the part of the Foundation is led by a national expert serving in a newly created Foundation position: BP fellow for energy and environmental advancement.

The Foundation also brings together other foundations, grantees, and community leaders to collaborate on critical projects that have a high probability of success; makes investments in promising early-stage and minority-owned companies; advocates for public





Jay Talbot and Goldie Alvis, program directors for more than two decades each and retiring in 2006, have played lead roles in shaping the Foundation's work in community development, neighborhood, and early childhood programs. The William Patrick Day Early Childhood Center is the scene of some of the important work of the countywide Invest in Children initiative the Foundation helped create in 1999.

policy changes to increase our global competitive position; educates the public on vital issues; and measures the performance of our efforts and the region's economy.

When we began our economic development initiative three years ago, the region's future was cloudy at best. Today, we have a clearer picture of what it will take to build economic success, and we have a vision of what success will look like. At this point, we are pleased with what we see.

**The Civic Innovation Lab is providing seed money to grow entrepreneurial ideas into successful civic ventures.**

**early childhood development**

**What can we do to improve a child's earliest years? How can we give each child the best possible start?**

We know that brain development is significantly shaped by environment during the first five years of life. We know that parental nurturing, quality childcare, and basic medical services – all critical to a healthy start – often are lacking. Ideally, like public education, early childhood programs should be universal. Yet that wasn't happening in Greater Cleveland, according to a Cleveland Foundation community assessment completed in the late 1990s.

The assessment showed that early childhood programs in the county operated in relative isolation from each other and at a scale insufficient to have broad impact. It also revealed that, of all of the community's constituents, Cuyahoga County officials were best positioned to support an all-inclusive approach to early childhood services.

In 1999, as the result of collaboration between the Foundation, other philanthropic funders, and the Cuyahoga County Board of Commissioners, "Invest in Children" was born. The new agency's mission was to redesign services aimed at giving children the best

possible start in life. The program offers prenatal care, childcare from infancy through preschool, services for children with special needs, and support and education for parents. In 2005, Invest in Children reached some 65,000 youngsters and their families, including more than 6,000 newborns, each of whom received an in-home visit from a registered nurse.

Invest in Children has been recognized as a national model for how local communities can effectively address the needs of their youngest citizens. Independent evaluations of the program over its first five years acknowledged its progress in reaching the vast majority of children in Cuyahoga County, strengthening families through home visitation services, increasing the percentage of children with health insurance, growing the utilization of preventive health care, and improving access to services for children with special needs. Program administrators are now exploring how to expand prenatal services. They also are considering how to better connect preschool day care with local public schools so that three- and four-year-olds are better prepared for kindergarten.

**Invest in Children has been recognized as a national model for how local communities can effectively address the needs of their youngest citizens.**

**neighborhoods and housing**

**Many of Cleveland's neighborhoods, historically rich in character and culture, continue to be lively, exciting and attractive. We want to keep them that way.**

At the same time, other neighborhoods have seen difficult times characterized by out-migration, physical decline, and the loss of retail businesses. They need revitalization.

To maintain the vigor and economic well-being of all our neighborhoods, The Cleveland Foundation for more than 15 years

has championed Neighborhood Progress Inc. (NPI), Cleveland's community development organization. In turn, NPI has been a driving force in revitalizing 16 neighborhoods. It has rehabilitated existing homes, constructed new houses, re-energized retail areas, and created parks and green space. Over the past three years, NPI, using program-related investments and other below-market-rate funds, has leveraged \$3.8 million in Cleveland Foundation grants into more than \$104 million in public and private investments.

In 2004, NPI began the first phase of a new strategic initiative to make Cleveland a more attractive place to live and work. Six neighborhoods, carefully selected through a competitive process, are involved: Buckeye-Woodland, Detroit-Shoreway, Fairfax, Glenville, Slavic Village and Tremont. Each neighborhood was selected for its ability to undertake at least one housing development of sufficient scale to help restore market forces, retain and grow population, and improve quality of life. The initiative addresses green space, retail districts, and other community-based services

– such as schools and libraries – that strengthen the fabric of a neighborhood.

Our support of NPI is a large-scale component of the Foundation's leadership in neighborhoods and housing. We are equally concerned about the human side of neighborhoods. Four years ago, the Foundation implemented Neighborhood Connections, a program providing modest support – grants from \$500 to \$5,000 – to community-based groups concerned with improving their neighborhood's quality of life. The program also helps grass roots groups and neighborhood leaders play increasingly responsible roles in civic life, their neighborhoods, and the city at large.

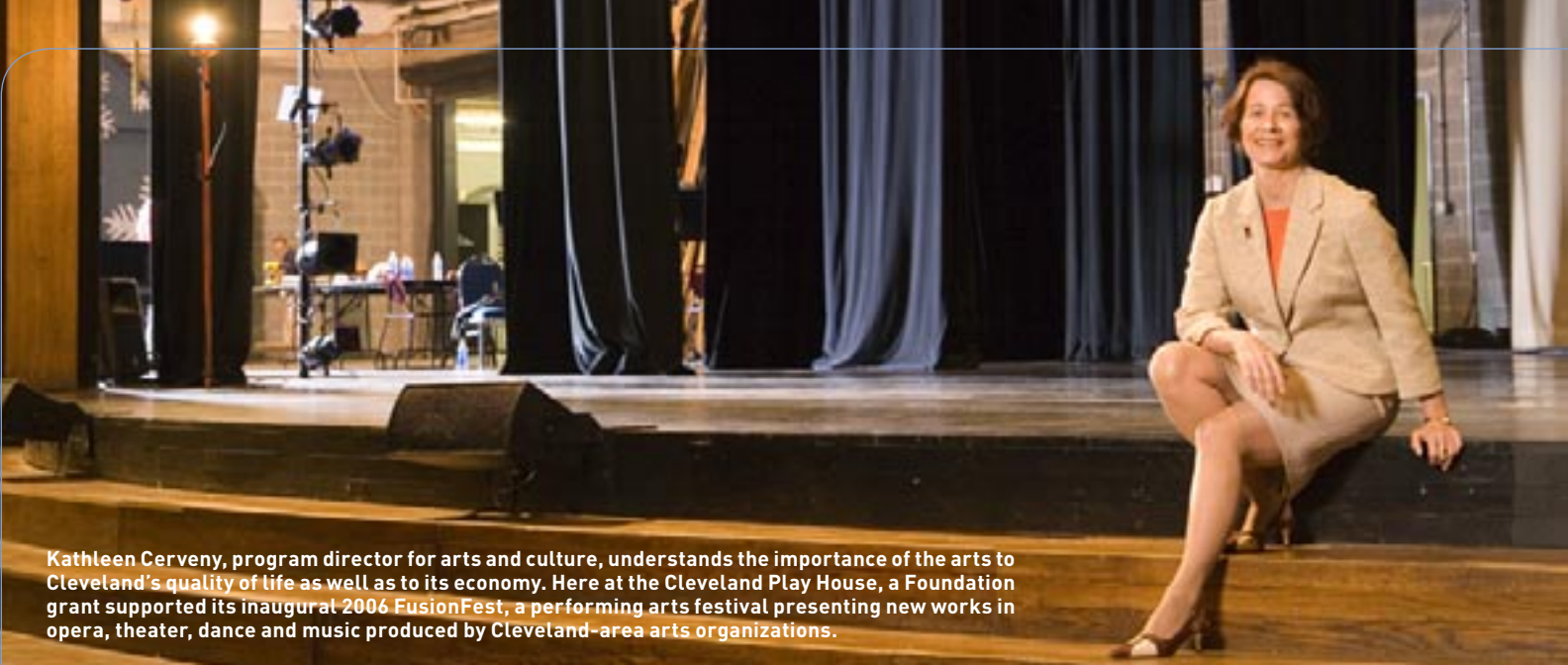
**The Cleveland Foundation for more than 15 years has championed Neighborhood Progress Inc., a driving force in revitalizing 16 neighborhoods.**

**TOMORROW'S LEADERS**

Members of the Cleveland Executive Fellowship Program, supported by The Cleveland Foundation, worked with Cleveland Mayor Frank Jackson on his nonpartisan transition team, one of the many career opportunities afforded them in their year-long experience. The program helps develop tomorrow's civic leaders for the region, preparing individuals for effective and ethical leadership in the public affairs arena. Fellows gain hands-on learning through executive-level placements in the business, nonprofit and public sectors. They learn how sectors interact, how decisions are made, and who guides Cleveland's civic agenda. Graduates are encouraged to parlay their fellowship experience into leadership roles in Greater Cleveland.







Kathleen Cerveny, program director for arts and culture, understands the importance of the arts to Cleveland's quality of life as well as to its economy. Here at the Cleveland Play House, a Foundation grant supported its inaugural 2006 FusionFest, a performing arts festival presenting new works in opera, theater, dance and music produced by Cleveland-area arts organizations.



Helen Williams, program director for education, played a leadership role at the newly renovated John Hay Small School Campus. Set to open this fall, the campus is home to the Cleveland School of Science and Medicine, which received considerable support from the Foundation, and two other small schools – the Cleveland School of Architecture and Design, and the Cleveland Early College High School.

arts advancement

You read about it daily – how the nation's arts and cultural institutions face extreme belt-tightening in response to declining resources. Challenges in Greater Cleveland are no different.

Over the past decade, even our largest arts and cultural institutions have been challenged by declining support from the Ohio Arts Council, the loss of once-generous corporate sponsors, and the need to grow next-generation audiences. Greater Cleveland faces the task of sustaining its impressive legacy of cultural assets while maintaining an environment of creativity and community engagement in the arts.

To address these imperatives, the Foundation in 2004 created the Arts Advancement Program. This three-year initiative seeks to strengthen well-established, but typically undercapitalized, mid-sized arts organizations by improving their operations and financial positions. Five arts groups were selected with the help of nationally

recognized experts in arts management. Each group is working to achieve financial sustainability, audience growth, effective board engagement, a culture of continuous planning and learning, and the ability to attract and retain visionary leaders. The Foundation has provided them access to national and local consultants and has supported performance-based grants for operations, working capital, new staff positions, planning and feasibility studies, and marketing.

Initial reviews indicate that the participating organizations are making gains earlier than is typically expected in advancement programs. Apollo's Fire (the Cleveland Baroque Orchestra) has grown its audience base through appearances at national and international music festivals; the Cleveland Film Society has collaborated with the Convention and Visitors Bureau of Greater Cleveland to build a broad regional audience; the Great Lakes Theater Festival and the Museum of Contemporary Art are posi-

tioned to move forward with important capital projects; and Young Audiences has developed plans for more sustainable funding in the face of cutbacks in subsidies for arts education.

An important byproduct of the Arts Advancement Program is what it has taught us about the effectiveness of performance-based grantmaking. We have learned much about what works and what doesn't – information that can help strengthen internal operations and leadership at arts organizations in today's continuously changing environment.

Greater Cleveland faces the task of sustaining its impressive legacy of cultural assets.

public school improvement

The year was 1917 when the nascent Cleveland Foundation unveiled its first-ever major study. The topic: Cleveland's public schools. "Public education must grow and change as fast as social conditions make such changes necessary," the report stated. "It can never be complete, crystallized, perfected." The education of our children was a major concern in 1917; almost a century later, it continues to challenge us.

This past year, we undertook a major review of our education grantmaking. What emerged is a new strategic direction to help improve public schools at the local, regional and state levels. Without strong public schools, our children suffer, and so does our region.

Our work in three areas – Cleveland public school reform, regional collaboration, and state policy – is an extension of our leadership in education and our concern for children.

ANISFIELD-WOLF AWARDS

The Cleveland Foundation oversees two annual awards established by Cleveland philanthropist and civic leader Edith Anisfield Wolf, who named the awards in honor of her husband and her father.

The Anisfield-Wolf Book Award, established in 1935, recognizes important contributions to our understanding of racism and our appreciation of the rich diversity of human cultures, and is the only juried American competition specifically dedicated to recognizing superior works of literature addressing issues of racism and diversity.

A panel of nationally known jurors led by Dr. Henry Louis Gates Jr., W.E.B. Du Bois professor of the humanities at Harvard University, chooses the winners. Other jury members are Rita Dove, commonwealth professor of English at the University of

Virginia; Joyce Carol Oates, professor of humanities at Princeton University; Steven Pinker, Johnstone family professor of psychology at Harvard University; and Simon Schama, professor of humanities at Columbia University.

Honored in 2005 were Geoffrey C. Ward for *Unforgivable Blackness: The Rise and Fall of Jack Johnson* (nonfiction); Edwidge Danticat for *The Dew Breaker* (fiction); and A. Van Jordan for *M-A-C-N-O-L-I-A* (fiction). Playwright August Wilson received the Lifetime Achievement Award.

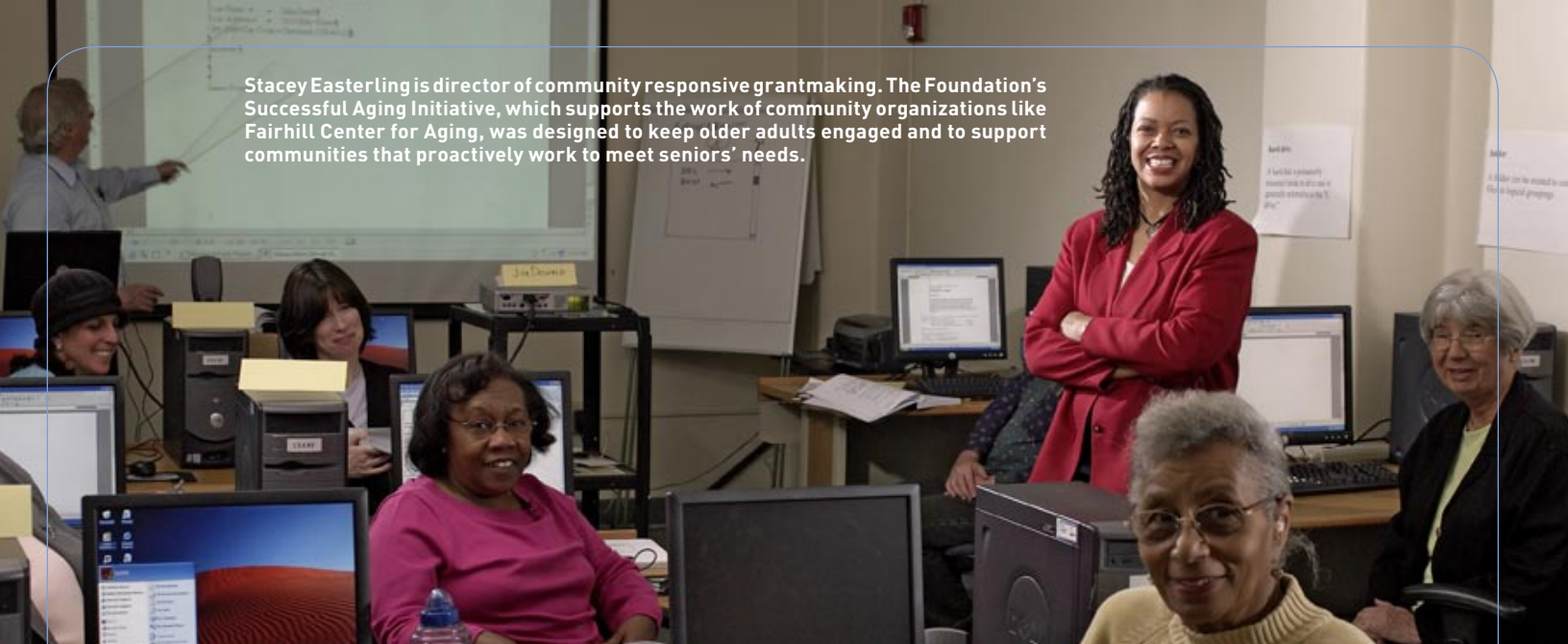
Honored in 2006 are Zadie Smith for *On Beauty* (fiction); and Jill Lepore, *New York Burning: Liberty, Slavery, and Conspiracy in Eighteenth-Century Manhattan* (nonfiction). Novelist William Denby received the Lifetime Achievement Award.



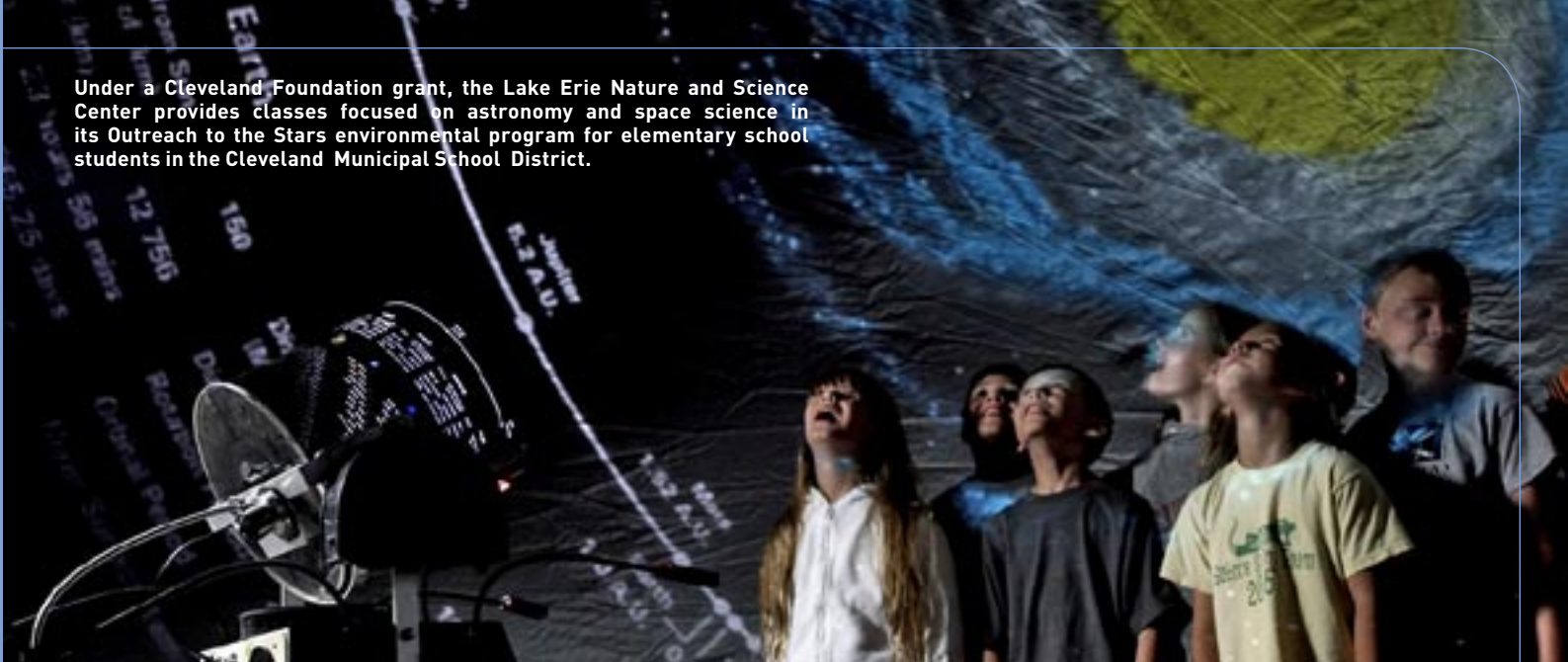
The Anisfield-Wolf Memorial Award for Outstanding Community Service, administered by the Center for Community Solutions, is awarded to a Cleveland-area nonprofit organization that demonstrates outstanding service. The 2005 award went to Adoption Network Cleveland, an educational, advocacy, support and search group for people affected by adoption. The 2006 award will be announced in March 2007.

Dr. Henry Louis Gates Jr., W.E.B. Du Bois professor of the humanities at Harvard University and chairman of the selection committee of the Anisfield-Wolf Book Awards, presides annually at the award ceremony. His eloquence and inspiration make this national book award a very special annual event in Cleveland.





Stacey Easterling is director of community responsive grantmaking. The Foundation's Successful Aging Initiative, which supports the work of community organizations like Fairhill Center for Aging, was designed to keep older adults engaged and to support communities that proactively work to meet seniors' needs.



Under a Cleveland Foundation grant, the Lake Erie Nature and Science Center provides classes focused on astronomy and space science in its Outreach to the Stars environmental program for elementary school students in the Cleveland Municipal School District.

First, we need to accelerate change in the Cleveland Municipal School District. Until recently, the Foundation had invested primarily in an agenda defined by the schools. Now, together with other foundations and civic institutions, the Foundation will work to proactively advance systemic innovation and strong reforms.

Second, we need to foster more collaboration and enhance existing alliances among the region's school systems and higher education institutions. Many of the region's urban districts – not only Cleveland – face similar challenges: declining enrollments, concerns about administrative and teacher quality, need for standards-based curriculum and assessments, safety and discipline, and parental involvement. Two urban collaboratives supported by the Foundation – the Ohio 8 Coalition and First Ring Superintendents Collaborative – have shown promise. We must build on those successes.

Third, we must work to make a positive impact on state policy, which is critical to the future of children in Cleveland and throughout Ohio. We are collaborating with the Ohio Grantmakers Forum to assess the quality of education in Ohio. The resulting report will help foundations and policy makers address key issues, such as student achievement, funding, and teaching quality.

**We need to accelerate change in the Cleveland schools. Together with other foundations and civic institutions, the Foundation will work to proactively advance systemic innovation and strong reforms.**

### successful aging

**The statistics are everywhere. Our nation's population is growing older. People are living longer and healthier. And they are seeking more purpose and enjoyment in their later years.**

In 2005, the Foundation completed its Successful Aging Initiative, which was quickly recognized as a national model. The three-year program has begun to change the way people in Cuyahoga County – the urban county with the nation's second-oldest population outside of the Sun Belt – think about aging.

Defining "successful aging" is itself a challenge. In simplest terms, it means dealing effectively with changes and challenges as we grow older – and doing so with the overall sense of well-being that comes from living with purpose and joy, meaningful relationships, and a sense of belonging. For communities, it means caring for the physical, social, and emotional needs of people as they age.

Rather than attempt to create new organizations, the initiative brought together existing community resources and awarded grants to 18 groups, which used the funds to test and implement new ideas. The initiative created six Lifelong Learning and Development Centers, numerous activities to engage older adults in the community, a public awareness campaign, and an assessment tool to help communities gauge and address how well they meet the needs of their aging populations.

Now, ongoing programs are in place in Greater Cleveland that say, "Here is where you can go for lifelong learning, for meaningful activities, and for civic engagement." While the initiative itself has ended, the Foundation will continue to make grants supporting the principles of successful aging. The funds will be offered through our community-responsive grantmaking process.

**Here is where you can go for lifelong learning, for meaningful activities, and for civic engagement.**

### community responsive grantmaking

In 2005, The Cleveland Foundation was pleased to be able to act favorably on more than 340 grant requests from the community. In addition to priority areas of need discussed earlier in this report, grants were awarded in human services, health and the environment. Many supported our community's most vulnerable populations: children, people with mental illness and homeless people.

Following is a small sample of community responsive grants for major capital needs, leadership, strategic planning and direct services. For a complete list of grants awarded in 2005, please visit our website, [www.clevelandfoundation.org](http://www.clevelandfoundation.org).



Care Alliance, which provides free or affordable primary medical care and comprehensive dental care to people who are homeless or living in public housing, received a grant from The Cleveland Foundation enabling it to expand its services.



A grant to Cleveland Public Art from The Cleveland Foundation will help fund strategic planning so that the private organization is better positioned to continue its mission to support and promote public art.



## major capital needs

Some of the major capital grants awarded include \$500,000 to **Mental Health Services for Homeless Persons** for the purchase and renovation of a 36,000-square-foot building on Payne Avenue. The building will allow MHS to consolidate its crisis services under one roof, provide separate clinical areas for children and adults, and create sufficient office space to support growth of the agency.

**Care Alliance**, which gives primary medical care and comprehensive dental care to individuals who are homeless or live in public housing, received a \$500,000 grant for its health center expansion projects. The increase of space will allow the organization to provide care to a minimum of 1,500 more people per year.

**Center for Families and Children** was awarded \$500,000 for renovation and expansion of its Midtown Human Services Training Center. The expansion will allow the center to concentrate its programs in one location, saving \$400,000 annually with room for future growth.

A \$200,000 grant was approved for the **Domestic Violence Center's** shelter renovation project. The renovation will create a facility better equipped to handle communal living and include additional space for programs, an ADA-accessible bedroom, and a youth center.

## leadership

Among the grants supporting leadership is a \$5 million grant to **Case Western Reserve University's School of Medicine** for establishment of the Case Proteomics Center, for the study of basic proteins, and for a program in immunology, which examines a host of defense mechanisms against pathogens and other harmful agents. Case plans to consolidate all immunology-based activity into a single hub that would be viewed as a central access point for research occurring between Case, University Hospitals of Cleveland and the Cleveland Clinic.

A grant for \$150,000 was awarded for transition committee work for Mayor Frank Jackson's incoming administration. The grant was used to help recruit a national pool of candidates for cabinet posts. And a \$58,000 grant was awarded to the **Cleveland Municipal School District** for the search and selection of a new superintendent of schools.

**Antioch Development Corporation** was awarded \$7,000 for support of the African-American Leadership Summit on Regionalism. The symposium was effective in convening community conversations and fostering civic engagement and inclusion on the issue of regionalism. **Cuyahoga Community College** received \$10,000 for its High-Tech Academy program. The academy, an innovative option school, prepares secondary-school students for careers in technology and encourages them to pursue higher education in math, science and technology-related fields.

A \$1.25 million grant went to **Cleveland Scholarship Programs** for its post-secondary advisory services and scholarships for its Six to Success and Adult Learner programs. Six to Success provides a continuum of services for all sixth through twelfth graders attending Cleveland middle and high schools, and inner-ring suburban high schools. The funds also will assist in the operation of a resource center.

## strategic planning for stronger futures

Grants supporting strategic planning for a stronger future included \$3 million to the **Cleveland Orchestra** to help restructure its business model, in addition to continued annual support for community outreach and education. The grant enables the orchestra to develop a sophisticated new business plan to strengthen it economically not for just one year, but far into the future. **The Poets' and Writers' League of Greater Cleveland** was awarded \$30,000 for strategic planning. The group is a literary organization that promotes writers and their work throughout Ohio.

A \$41,300 grant to **Cleveland Public Art** will help fund strategic planning to enable the private organization, which has few sources of income, to sustain itself and continue its mission to support and promote public art. An award of \$82,000 went to the **Cleveland Institute of Art** for a market study and facilities planning for its Single Campus Initiative. The institution currently operates in two separate facilities. This grant is helping CIA plan for its eventual relocation to a consolidated campus.

**The Diabetes Association of Greater Cleveland** was awarded \$22,350 for a strategic planning process to focus the agency and its leaders on organizational and programmatic priorities for the next three to five years. The **Western Reserve Area Agency on Aging** was awarded \$35,000 to undertake a needs assessment and strategic planning. The group plans to use its grant to engage a strategic planning consultant.

A \$25,000 grant to **Senior Outreach Services** will enable the organization to develop a detailed plan for construction or renovation of a building to serve as its headquarters for administration and programming. The agency's board of directors plans to use the findings to determine the feasibility of creating a new facility. **The Cleveland Foodbank**, having greatly increased its capacity and undergone significant changes recently, was awarded \$25,000 for a strategic plan to guide it through the next three years.

## direct services

The year's grants supporting direct services included \$10,000 to the **Lake Erie Nature and Science Center** for its Outreach to the Stars environmental program. Its traveling exhibit includes a portable planetarium and provides elementary school students in the Cleveland Municipal School District with experiential learning in astronomy and space science.

**ParkWorks**, an organization promoting parks and green space for community development, received \$75,000 for its health promotion program. This grant will support planning efforts for a new, permanent home for the fitness group Clevelanders in Motion, which finds ways to increase and sustain exercise for all age groups in the community.

**The Cleveland Rape Crisis Center** was awarded \$70,000 to fund the position of a full-time trauma and addiction specialist to better address the correlation between sexual assault and substance abuse. **The Covenant**, a drug-treatment program for indigent adolescents, received a \$40,000 grant for expansion of day-treatment services for chemically dependent or dually diagnosed adolescents. The funds will go toward personnel expenses, contract services, equipment and supplies.



Caprice Bragg oversees giftmaking at the Foundation. She works closely with donors, who can designate their contributions to specific organizations or causes, or give unrestricted dollars for the Foundation to use toward the community's greatest needs.

what motivates people to be philanthropic?

The Cleveland Foundation invited donors representing three different philanthropic traditions to be part of an informal panel to discuss their motivations for giving.

Attending were Albert (“Bert”) and June Antoine, who have established an education fund in honor of their late daughter; Henry (“Hank”) Doll, who has created a planned gift; and Frederick (“Fritz”) and Jane Neubauer, who have established a fund to benefit children. Caprice Bragg, vice president for gift planning and donor relations at The Cleveland Foundation, moderated the discussion. Ideastream, the home of public television and public radio in Cleveland, graciously provided the setting. Following are excerpts from that conversation.

**Caprice Bragg** | Our purpose today is a conversation about philanthropy and some of the pressing issues facing Greater Cleveland. For starters, how did each of you “learn” philanthropy?

**June Antoine** | It goes back to Sunday school where you were taught that anybody in need was your neighbor. And considering our family was blessed, we believed that “to whom much has been given, much is required,” that if you have anything, it’s your responsibility to help others. I never thought of that as philanthropy, because I thought that philanthropists had to be very wealthy.

**Bert Antoine** | June and I feel strongly that it’s just what you’re supposed to do, that it is the right thing to do.

**Hank Doll** | I had the same experience in my Sunday school and got the message early on about how important it is to give back. Those who are richly blessed, you return something of what you’re given. Kids in our church had those little pledge cards and you could put even a nickel in it. Later, when my dad was involved with the Erie Community Foundation, he modeled for me both in his own giving and in the foundation’s giving what a philanthropist could do for the community.

**Fritz Neubauer** | Jane and I come from families that were involved in philanthropy for generations. It was second nature to them. Now, as a small business owner and relatively young, it’s fairly new to me. Jane and I sat down and said, “Our parents and grandparents and great-grandparents did so much for the community and we need to continue that.” And now we want to pass that on to our son.

“Get involved in the excitement of participating, the excitement of giving, the satisfaction you get. It’s very rewarding.” Hank Doll



Hank Doll

**Jane Neubauer** | Like Fritz, I grew up with parents who didn’t formally say, “This is philanthropy,” but they made it clear that this is part of your obligation, this is what you do. Whether it was time or your money, it was simply a way of life. I remember my mom doing a lot of volunteer work, and my dad now chairs a foundation board in Cleveland. That’s not a paid thing, that’s a giving thing. We were taught that when you’re blessed and can do the things you want to do, you should help others do the same.

**Fritz Neubauer** | You see people our age who unfortunately take a lot for granted. They think they are entitled rather than blessed. It’s not the way you want your kids to grow up.

**Caprice Bragg** | I’m curious. What causes inspired each of you to give?

**Bert Antoine** | We established a fund with The Cleveland Foundation in memory of our daughter. Janice was just 39 years old and she had just had a baby before she died. We just wanted to honor her. She was very active in encouraging minority women to go into mathematics and science. Our grant supports that.

**June Antoine** | Bert’s expertise is science and chemistry, which is what our daughter followed. She earned her undergraduate degree at MIT in chemical engineering and her master’s and Ph.D. at the University of Pennsylvania in chemical engineering. She was a leading professor at the University of Maryland in biochemical engineering, where she took a special delight in mentoring undergraduate and graduate women. We wanted to continue her dream of helping other women get graduate education in science and math, which is why we established this fund.

**Hank Doll** | My involvement with The Cleveland Foundation is with a charitable remainder trust for the City Club. I was involved with the City Club Forum Foundation, a group I believe in deeply. They chose The Cleveland Foundation to manage whatever people give as planned gifts. That’s how I got to The Cleveland Foundation, with a planned gift, so when I pass away the beneficiary is the City Club Forum Foundation Fund at The Cleveland Foundation.

**Jane Neubauer** | We wanted to find a way to involve our friends, people in our generation, to make philanthropy part of their lives, even if it’s small amounts of money or time. I think you can make a big difference without a huge wallet. So we started a donor advised fund called the “Feel Good Foundation.” It gives to organizations that help children feel good – physically, mentally, emotionally. In addition to what we’re able to put in ourselves, we raise funds from our friends and family by creating small “feel good” events that often have a “giving” element to them.

**Fritz Neubauer** | Having recently had our first child, it makes us realize, once again, how lucky we are. It’s heartbreaking to see what a lot of children have to go through, whether it’s health or neglect or poverty. That’s why we’ve concentrated on children.

“We wanted to continue our daughter’s dream of helping other women get graduate education in science and math, which is why we established our fund.” June Antoine



“June and I feel strongly that philanthropy is what you’re supposed to do, the right thing to do.” Bert Antoine



Bert Antoine



June Antoine

**June Antoine** | For a long time I had been aware of The Cleveland Foundation. I became interested when a friend started a fund here. I thought that it had to be a huge sum to start one, but when I found out that you could start one with as little as \$10,000, well, Bert and I decided we could manage that.

**Caprice Bragg** | That’s interesting, because for some people the word “philanthropy” does conjure up images of exceptional wealth, yet it’s important that people know there’s a wide range of giving options and that we are interested in donors who reflect a broad base of our community. I know that you, as donors, are interested in our five priority areas: economic development, public school improvement, early childhood development, neighborhoods and housing, and arts advancement. What do you see as the one or two most pressing for Greater Cleveland?

**Bert Antoine** | The two most important areas you have to address are economic development and public schools. We need to reduce unemployment and improve the schools. At one time Cleveland schools were the pride and joy of their neighborhoods. Cleveland had a very high reputation for high-quality schools. We have to get back to that.

**Hank Doll** | I agree on both and would only add that when you think about public schools, there has to be a change in the way they’re funded in Ohio. Also, Cleveland’s schools aren’t going to improve very much unless all citizens in the county take ownership of them, not just those living in the city. Ultimately, everybody who lives in this area is affected by the schools, not just intellectually, but also economically.

**June Antoine** | We need better funding, better-educated teachers and a better job administering the schools. We cannot have crowded classrooms. You do not get good quality with huge classrooms, no matter how good the teacher is. And there must be higher expectations by teachers as to how well each child can do – we must insist on high standards from pre-K up.

**Jane Neubauer** | I’d like to think the public schools could handle the needs of educating our future labor force, but it’s not working. And Cleveland schools are not the only ones with problems. They also exist in some suburban systems. The Cleveland Foundation can take a lead in finding a solution. And in terms of invigorating Cleveland’s economic engine, again, I think The Cleveland Foundation can and should be a leader.

**Fritz Neubauer** | We have wasted resources, including a lot of wasted shoreline. Have you ever been to Baltimore? They’ve done wonderful things with their harbor, which tells me there’s a lot that could be done here. Cleveland could look like that.

“For some people the word ‘philanthropy’ conjures up images of exceptional wealth, yet it’s important that people know there’s a wide range of giving options and that we are interested in donors who reflect a broad base of our community.” Caprice Bragg

**Jane Neubauer** | Do we need a convention center? Maybe. Do we need more on the lakefront? Yes. We need a lot of things that cost money. Business will fund some of it, individuals might fund some of it, the state or county or local governments might fund some of it, but it’s going to be foundations putting their “oomph” behind the right projects that will make them happen.

**Caprice Bragg** | In the future you might see The Cleveland Foundation become more visible on issues such as economic development or alternative energy or education. We all know that these are important issues. But do you feel that it’s appropriate for the Foundation to be an outspoken advocate? Or should a foundation be neutral?

“We come from families that were involved in philanthropy for generations. It was second nature to them. Now we want to pass that on to our son.” Fritz Neubauer



Jane Neubauer



Fritz Neubauer

**Hank Doll** | If you’re going to be a leader, which is in your mission, you have to be willing to take positions. You have to be willing to say that from your perspective, here’s what’s really important, here’s what’s going to help our community. And you say that by investing funds strategically, where they can make a big difference in the way in which our community grows, develops, and is perceived. But you don’t do this in a vacuum. You have to always be listening to what the community is saying.

**Bert Antoine** | As you mentioned, alternative energy is a big issue in this country. Whatever kinds of research or industry the Foundation can help develop can only enhance the region. If our region could develop an expertise in an area such as alternative energy, that would bring in a lot of talent and create jobs.

**Hank Doll** | The Foundation doesn’t always have to be a visible leader. Playhouse Square’s renaissance wasn’t initiated by The Cleveland Foundation, but the Foundation saw its value, invested in it, helped to tweak it, and was leading from behind the scenes. That is just as important.

**Fritz Neubauer** | Like with anything else, the more active you get, the more criticism and naysayers you’re going to have. So what? You just have to do your best thinking about what’s best for the region, and then do it.

**Jane Neubauer** | The Cleveland Foundation should be out there advocating initiatives that make a difference. With your size and track record, you have power and influence. When you make a grant, you’re basically saying you believe in what is being done. You become an advocate. When people see the Foundation give to something, that adds credibility and can be a catalyst to get others involved. So when you choose to invest in alternative energy, for example, which I think is a very good place to put research money, you should be out there advocating what you’re doing and why.

**Caprice Bragg** | There’s a lot of responsibility that goes with that.

**Jane Neubauer** | There is. But you do a lot of due diligence before you give grants, and I know those decisions aren’t taken lightly.

**Caprice Bragg** | No, they are not. Does anyone have a final thought?

**Hank Doll** | It would be great if the Foundation could somehow get a lot more people involved in philanthropy at all levels, whether it’s families that have been around a long time or new entrepreneurs. Get them involved in the excitement of participating, the excitement of giving, the satisfaction you get. It’s very rewarding.

**Caprice Bragg** | That’s a great way to end our discussion. Thank you all very, very much. We’ve had three different philanthropic traditions represented here and we think it’s beautiful to see what each of you has done.

“The Foundation should be out there advocating initiatives that make a difference. When people see the Foundation make a grant to something, that adds credibility and can be a catalyst to get others involved.” Jane Neubauer

## 2005 New Gifts



# GIVING

## through the cleveland foundation

The Cleveland Foundation’s role as a leader in the community would not be possible without the extraordinary philanthropy and foresight of our donors – past and present – for nearly a century.

Each year, hundreds of individuals, families, organizations and corporations utilize the Foundation as their partner in philanthropy. Through our knowledge of the community and sound fiscal stewardship, we help them achieve their philanthropic goals in intelligent and creative ways, often by designing personalized funds that assure that their charitable contributions have the desired impact.

We deeply appreciate the contributions of each and every donor. Their personalized funds and planned gifts enable us to continue our mission of improving the quality of life for all Greater Clevelanders, now and for generations to come.

**Caprice H. Bragg**  
Vice President for Gift Planning and Donor Relations

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Fay-Tyler Norton  
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Mahesh Patel, M.D.  
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Mr. and Mrs. David L. Yeomans  
Patrick Zohn  
Malcolm and Helene Zucker

\* Deceased

new named funds, planned gifts, and donor advised funds

The funds listed here were established to support the educational, charitable and public needs of our community. We are grateful to each of them.



new scholarship, organizational endowment, and other funds

New Named Funds and Planned Gifts

Anonymous

**Linda K. Brengle Fund**  
Established by the Estate of Linda K. Brengle

**E. Bruce and Virginia R. Chaney Library Fund**  
Established by E. Bruce and Virginia R. Chaney

**Richard F. Coyne Charitable Gift Annuity**  
Established by Richard F. Coyne

**Phoebe Flory Fund**  
Established by the Phoebe Flory Trust

**Robert D. Gries Annual Lecture Fund**  
Established by the Gries VI Generation Funds of The Cleveland Foundation and the Jewish Community Federation of Cleveland

**Myra Tuteur Kahn Memorial Fund**  
Established by the Sophie Lasalle Tuteur Trust

**William H. Jr. and Jeannette Lytle Knight Fund**  
Established by the William H. Knight Jr. Trust

**Allan MacDonald Memorial Fund**  
Established by Karen MacDonald

**David and Lindsay Morgenthaler Fund**  
Established by David and Lindsay Morgenthaler

**SchoolPrism Fund for Children**  
Established by Organizational Effectiveness Strategies Inc.

**Alan H. and Marilyn M. Wilde Charitable Gift Annuity**  
Established by Marilyn M. Wilde and Alan H. Wilde, M.D.

New Donor Advised Funds

Anonymous

**James A. Carney Family Foundation**  
Established by the Carney Foundation

**E. Bruce and Virginia R. Chaney Scholarship Fund**  
Established by E. Bruce and Virginia Chaney

**Condit Family Fund**  
Established by David and Margaret Condit

**Charles and Donna Denny Foundation**  
Established by Charles and Donna Denny

**John D. and Caroline H. DesPrez Charitable Fund**  
Established by Caroline H. DesPrez

**Dietrich Family Foundation**  
Established by Richard and Nancy Dietrich

**Mrs. Linda Diffie Charitable Fund**  
Established by Linda M. Diffie

**Ted & Nancy Goble Fund**  
Established by Ted W. Goble

**Gustavsson Family Donor Advised Fund**  
Established by Marie L. Gustavsson-Monago

**JJ Fund**  
Established by James J. Hamilton

**Kaiser Permanente Community Benefit Fund**  
Established by Kaiser Foundation Health Plan of Ohio

**Keen Family Fund**  
Established by Paul Keen and Denise Horstman

**Avis E. Singleton Lappin Fund**  
Established by Avis E. Lappin

**Thomas T. Law Fund**  
Established by Thomas T. Law Foundation

**Dr. Janice Antoine Lumpkin Fund**  
Established by Dr. Albert C. Antoine and June Sallee Antoine

**MACD Education Fund**  
Established by Mary Ann Corrigan-Davis

**Majewski Family Fund**  
Established by Kent A. and Debra M. Majewski

**Majic Family Fund**  
Established by R. Eric Kennedy

**Marra Family Fund**  
Established by anonymous donors

**Mayor Jane Campbell's Hurricane Katrina Relief Fund**  
Established by various City of Cleveland employees

**McBride Fund**  
Established by Elizabeth McBride

**Diane O. McDaniel Charitable Fund**  
Established by Diane O. McDaniel

**Barbara and Stanley Meisel Community Fund**  
Established by Stanley A. and Barbara S. Meisel

**Phoenix Miller Fund**  
Established by Lee A. and Linda P. Miller

**New Arts Fund**  
Established by an anonymous donor

**Reitz Giftfund**  
Established by Michael and Jeanne Reitz

**Sandys Fund**  
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**Santa Fund**  
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**Schron Family Foundation**  
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**Shields Family Trust**  
Established by John A. Shields

**Richard G. Small Memorial Trust Fund**  
Established by Mark Small and Michael Minotti

**Dr. Melodie Mayberry-Stewart 21st Century Leadership Scholars**  
Established by Dr. Melodie Mayberry-Stewart

**J.D. Suhanic Fund**  
Established by Jeffrey D. Suhanic

New Scholarship Fund

**Charlotte Alexander Fund**  
Established by Educational Trust of the Inner City Protestant Parish

New Organizational Endowment Funds

**Bedford Historical Society Endowment Fund**

**East End Neighborhood House Inc. Endowment Fund**

**Galen Foundation Fund**

**Geauga Park District Education Endowment Fund**

**Geauga Park District Unrestricted Endowment Fund**

**Geauga Park District Stewardship Endowment Fund**

**Jenny Goldman Memorial Nature Outreach Fund for the Nature Center at Shaker Lakes**

**Betsey C. Kaufman Fund for Planned Parenthood**

**Margaret Clark Morgan Foundation Fund of the North Coast Community Homes**

**National Black MBA Association Cleveland - NE Ohio Endowment Fund**

**Womankind Inc. Endowment Fund**

Other Funds

**Ben Broussard Charitable Foundation**  
Established by Ben Broussard

**Robert R. Buhl Fund**  
Established by B. Kingsley Buhl, Lance Buhl and Timothy Buhl

**North Coast to the Gulf Coast Fund**  
Established by Congresswoman Stephanie Tubbs-Jones



supporting organizations and their directors



external committee members, advisors, consultants, and volunteers

Philanthropy is not just giving of treasure, but also of time and talent. We are thankful for the many individuals who volunteer their energy and expertise in support of the mission of The Cleveland Foundation.

bank trustees committee members

investment options

Choosing the investment option for philanthropic funds for growth is just as important as the decision to entrust The Cleveland Foundation with overseeing and distributing those funds. The Foundation provides donors with a variety of investment options and strategies to choose from for the fund they establish, allowing them to select the one that will help them meet their philanthropic objectives.

**City of Cleveland’s Cable Television Minority Arts and Education Fund**  
Hon. Roosevelt Coats  
Barbara J. Danforth  
Sharon H. Glaspie  
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Michael House  
(effective April 2006)  
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Yvonne Pointer-Triplett  
Hilary S. Taylor  
Lorna Wisham  
(completed term March 2006)

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Steven A. Minter

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Michael J. Hoffmann  
Janet E. Neary

**McDonald Fund**  
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Peter Broer  
David G. Hill  
(deceased September 2005)  
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Fatima Weathers  
Ernest Wilkerson Jr.

**Medical Mutual of Ohio Charitable Foundation**  
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(effective July 2005)  
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Jacqueline F. Woods  
(completed term June 2005)

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Susan Lajoie Eagan  
Steven A. Minter  
Jon H. Outcalt  
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**Treu-Mart Fund**  
A supporting organization of both The Cleveland Foundation and the Jewish Community Federation of Cleveland  
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As of June 1, 2006

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CEO, McDonald  
Financial Group

**David J. Janus**  
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FirstMerit Bank N.A. –  
Cleveland

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Ohio Region  
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National City Bank

Banks

**Bank One Ohio Trust Co. NA**  
1300 East 9th Street  
Suite 1300  
Cleveland, OH 44114

**FirstMerit Bank NA**  
101 West Prospect Avenue  
Suite 350  
Cleveland, OH 44115

**Huntington National Bank**  
917 Euclid Avenue  
Cleveland, OH 44115

**Key Bank NA**  
127 Public Square  
16th Floor  
Cleveland, OH 44114

**National City Bank**  
1900 East 9th Street  
Cleveland, OH 44114

**Northern Trust Bank FSB**  
127 Public Square  
Suite 5150  
Cleveland, OH 44114

**U.S. Bank**  
1350 Euclid Avenue  
Suite 1100  
Cleveland, Ohio 44115

Investment Management Firms

**Alliance Bernstein**  
3201 Enterprise Parkway  
Suite 240  
Cleveland, OH 44122

**Carnegie Capital Management Co.**  
1228 Euclid Avenue  
Suite 1100  
Cleveland, Ohio 44115

**Fairport Asset Management LLC**  
3636 Euclid Avenue  
Suite 3000  
Cleveland, OH 44115

**Glenmede Trust Co. NA**  
One Corporate Exchange  
25825 Science Park Drive  
Suite 110  
Beachwood, OH 44122

**Gries Financial LLC**  
1801 East 9th Street  
Suite 1600  
Cleveland, OH 44114

**Investment Fund for Foundations**  
2405 Ivy Road  
Charlottesville, VA 22903

**Karpus Investment Management**  
183 Sully’s Trail  
Pittsford, NY 14534

**Lakepoint Investment Partners LLC**  
Key Tower  
127 Public Square  
Suite 4130  
Cleveland, OH 44114

**Mellon Private Trust Co. NA**  
30195 Chagrin Boulevard  
Suite 350W  
Cleveland, OH 44124

**Private Trust Co.**  
1422 Euclid Avenue  
Suite 1130  
Cleveland, OH 44115

**Union Heritage Capital Management**  
211 W. Fort Street  
Suite 615  
Detroit, MI 48226

Individual Advisors

**BDS Financial Services**

**Cleveland Financial Group**

**Ferris Baker Watts**

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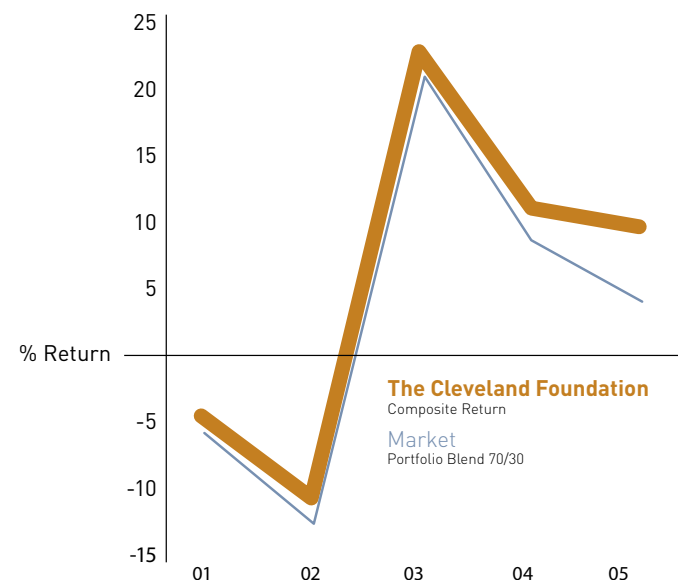
**McDonald Financial Group**

**Robert W. Baird & Co. Inc.**

Indexed Mutual Funds

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## 2005 financial summary

The assets of The Cleveland Foundation were \$1,716,136,165 as of December 31, 2005, up from \$1,632,621,913 at year-end 2004.

2005 was a year of positive growth from investments and new gifts. Revenue from investment amounted to \$134,437,420. Combined with donor contributions of \$28,399,413 and other income of \$1,128,446, total revenue was \$163,965,279.

Expenses in 2005 were \$82,274,592, resulting in an increase in net assets of \$81,690,687. Administrative expenses were \$9,757,329, approximately 57 basis points or ½% of total assets at year end, continuing to be one of the lowest rates among peer community foundations and comparable to the private sector. Grant expense according to generally accepted accounting principals (GAAP) was \$66,352,407. This amount does not include conditional grants, which are approved by the board but not recognized in the financial statements until certain conditions are met by the grantee organization. Conditional grants as of December 31, 2005, totaled \$11,546,474.

On the investment side, only two sectors in the traditional markets performed well in 2005. In the United States returns were driven by the energy and utilities sectors, 31.4% and 16.8%, respectively. Returns in the telecom and consumer discretionary sectors were negative, and returns in the remaining sectors were minimal. The return of the S&P 500 was 4.9% for 2005, clearly below the historical average.

Of the traditional asset classes, the best performing class in 2005 was emerging market equities. This asset class generated returns of 34.5% while international small caps generated 26.7%. International equities, measured by the European Australian Far East Index, generated returns of 14.0% compared to the S&P 500 at 4.9%. International equities clearly outperformed domestic equities last year.

In the bond market, the Lehman Aggregate as a measure of fixed income returns generated 2.4% for 2005.

The chart above presents the difference in total returns of the Foundation compared with the returns of a portfolio of 70% stocks, as measured by the S&P 500, and 30% bonds, as measured by the aggregate. The chart covers the five-year period from 2001 through 2005. During this period, the Foundation generated \$333,567,222 from investment. It is important to note that the period includes 2001 and 2002 in which the S&P 500 returned -11.8% and -22.11%, respectively.

The composite return of the Foundation for 2005 was 9.6%, compared with the average 4.15% return generated from a traditional portfolio of 70% stocks and 30% bonds. The Foundation benefited from an overweight position in the energy sector, a 17% position in international equities, and positive returns from the 13% position in alternative investments in the portfolio. We continue to follow a strategy of diversification among various asset classes to limit risk and enhance returns.

We have continued to increase our position in alternative investments to increase our diversification and to reduce the correlation between asset classes. We firmly believe that this approach will allow us to achieve our primary goal of generating a consistent stream of resources to the community over time, while concurrently increasing the purchasing power of the assets over time. With our spending policy based upon the average market value of the prior 12 quarters, we expect that the results of the last three years will provide growth in our Foundation's grantmaking ability in future years.

*J. T. Mullen*  
**J. T. Mullen**  
 Senior Vice President and Chief Financial Officer



## board of directors\*

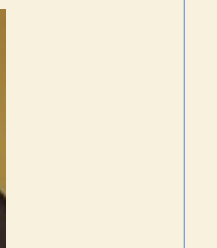
The board of directors governs The Cleveland Foundation, establishes policy, sets priorities and makes final grant decisions. All board members are volunteers serving a maximum of 10 years. The board appointment process ensures a broad range of views and knowledge, and our board makeup reflects that of the larger community. The Bank Trustees Committee, comprising the presidents of the Foundation's five trustee banks, appoints five of the Foundation's board members. Public officials also appoint five members: one member each is appointed by the chief judge of the United States District Court for the Northern District of Ohio, Eastern Division; the senior or presiding judge of the Probate Division, Court of Common Pleas of Cuyahoga County; the administrative judge of the Court of Appeals of the Eighth Judicial District of Ohio; the mayor of the City of Cleveland; and the board of directors of the Center for Community Solutions. The remaining five directors are appointed by a majority vote of the Foundation's board of directors.



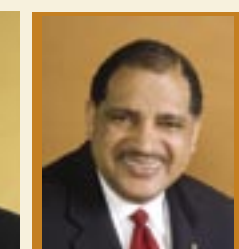
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**David Goldberg**  
**Joseph P. Keithley**  
**Benson P. Lee**



**Jacqueline F. Woods**  
**Rev. Dr. Otis Moss Jr.**  
**Charles P. Bolton**  
**Terri Hamilton Brown**



**Frederick R. Nance**  
**Sandra Pianalto**  
**Maria Jose Pujana, M.D.**  
**James A. Ratner**  
**Alayne L. Reitman**  
**Rev. Hilton O. Smith**  
**Frank C. Sullivan**



\*As of May 1, 2006



board of directors

Jacqueline F. Woods, Chairperson

Jackie Woods is retired president of SBC/Ameritech in Ohio (now AT&T), and is a senior consultant for Landau Public Relations in Cleveland. She currently serves as a director of the Timken Co. and the Andersons Inc.; is a member of the executive committee of the Greater Cleveland Sports Commission; is a board member of Playhouse Square Foundation, Muskingum College, Kent State University and University Hospitals of Cleveland; a national trustee of the Foundation for Independent Higher Education; and chairman emeritus of the Cleveland Chapter of the American Red Cross and the Great Lakes Science Center. She is a graduate of Muskingum College.

Rev. Dr. Otis Moss Jr., Vice Chairman

Rev. Otis Moss Jr. has been pastor of Olivet Institutional Baptist Church since 1975. Named by *Ebony* magazine as one of America’s greatest black preachers, he has been involved in the civil rights movement for more than 40 years. A founding board member of the Greater Cleveland Roundtable, he currently chairs the board of trustees of Morehouse College. He holds a bachelor of arts from Morehouse College and a Master of Divinity from Morehouse School of Religion of the Interdenominational Theological Center. He also holds a Doctor of Ministry from United Theological Seminary in Dayton, Ohio. He was selected in 2004 to give the 2004-05 Lyman Beecher Lecture Series at Yale University Divinity School.

Charles P. Bolton

Charles Bolton is chairman of the board of directors of Brittany Stamping LLP and Polychem Corp. He is a trustee of the Cleveland Museum of Art, Musical Arts Association and Kelvin and Eleanor Smith Foundation; an honorary trustee of Case Western Reserve University; and a life trustee of Hawken School. He holds an A.B. degree in American history from Harvard College and an MBA from Harvard Business School.

Terri Hamilton Brown

Brown is senior vice president for corporate diversity at National City Bank. She previously served as president of University Circle Inc., as executive director of the Cuyahoga Metropolitan Housing Authority, and in the City of Cleveland Department of Community Development. She is a trustee of Downtown Cleveland Alliance, First Tee of Cleveland, Gilmour Academy, In Counsel with Women, and the President’s Council Foundation and is a graduate of Leadership Cleveland. Brown holds a bachelor’s degree in economics from the University of Chicago and a master’s degree in city planning from the Massachusetts Institute of Technology.

Tana N. Carney

Tana Carney currently serves as a director on the boards of the Cleveland Botanical Garden, the Cuyahoga County Library Foundation, West Side Ecumenical Ministry, and Ingenuity, a Cleveland Festival of Art and Technology. She also has served on the alumni board of trustees at Goucher College in Towson, Maryland. Tana holds a bachelor of arts from Goucher College and a master of arts from Case Western Reserve University.

David Goldberg

David Goldberg is co-chairman of the board of Ohio Savings Bank. He holds a bachelor of science from Ohio State University and a juris doctor from Case Western Reserve University School of Law. He is chairman of the board for Neighborhood Progress Inc. and for the Downtown Cleveland Alliance. He also is a member of the board of NorTech, the Greater Cleveland Partnership, University Hospitals of Cleveland, and the Mt. Sinai Health Care Foundation.

Joseph P. Keithley

Joseph Keithley is chairman of the board, president and CEO of Keithley Instruments Inc. He is a member of the board of trustees of Case Western Reserve University, on the visiting committee of the Case School of Engineering, and on the advisory council of Cornell University’s School of Electrical and Computer Engineering. He is vice chairman of the board of NorTech, a member of the Ohio Aerospace Council, a director of Brush Engineered Materials and of Nordson Corp., and an advisor to Early Stage Partners. He holds a bachelor of science and a master of operations research and industrial engineering from Cornell University and a master of business administration from the University of Michigan.

Benson P. Lee

Benson Lee is president and chief executive officer of Technology Management Inc., a developer of fuel cell systems. He is a trustee emeritus of Cornell University and is on the Executive Council of the Johnson School’s Center for Sustainable Global Enterprise. He serves on the Visiting Committee of the Cleveland State University Nance College of Business, MotivAsians for Cleveland, and Sustainable Cleveland. He is a former trustee of the Center for Community Solutions and Cleveland Scholarship Programs, and a founding trustee of the Cleveland Tomorrow Center for Venture Development, now JumpStart Inc. He received his bachelor’s and master’s degrees in electrical engineering from Cornell University.

Frederick R. Nance

Frederick R. Nance serves as the managing partner of Squire Sanders’ Cleveland office, where he focuses on commercial litigation, sports law, construction law and public-private partnerships. He is the chairman of the Greater Cleveland Partnership and is a trustee of the Cleveland Clinic Foundation. He also serves on the boards of BioEnterprise Inc., United Way of Greater Cleveland, and the Catholic Diocese of Cleveland Foundation. He holds a bachelor’s degree from Harvard University and a juris doctor from the University of Michigan.

Sandra Pianalto

Sandra Pianalto is the president and CEO of the Federal Reserve Bank of Cleveland. She joined the Bank in 1983 as an economist in the research department. She is a member of the board of the Greater Cleveland Partnership, University Hospitals Health System, United Way Services of Cleveland, the Rock and Roll Hall of Fame and Museum, Northeast Ohio Council on Higher Education and the Catholic Diocese of Cleveland Foundation. She holds a bachelor’s degree in economics from the University of Akron and a master’s degree in economics from George Washington University.

Maria Jose Pujana, M.D.

Maria Pujana, M.D., a clinical neurologist and neurophysiologist, is adjunct instructor at Case Western Reserve University’s Center for Global Health and Diseases in the School of Medicine. She also is president and designer of Marise Jewelry Designs Co. She serves on the boards of the MetroHealth Foundation, Greater Cleveland Chapter of the American Red Cross, Beck Center for the Arts and Cleveland Institute of Art. She formerly served on the boards or in leadership positions for El Barrio, Hispanic Cultural Center, Cuyahoga Community College Foundation, Rock and Roll Hall of Fame and Museum, and Cleveland Ballet. Dr. Pujana earned her medical degree from Universidad Complutense in Madrid.

James A. Ratner

James A. Ratner is Executive Vice President of Forest City Enterprises. Mr. Ratner is responsible for all commercial development including retail, office, bioscience and mixed use properties. He is a member of the board of trustees of Case Western Reserve University, Cleveland Museum of Art, Urban Land Institute and Playhouse Square Foundation. He holds a bachelor’s degree from Columbia University and a master’s degree from Harvard University Graduate School of Business Administration.

Alayne L. Reitman

Alayne Reitman holds a bachelor of arts from Emory University and an MBA from the University of Pennsylvania’s Wharton School. Reitman serves as a trustee and assistant treasurer of Hawken School, a trustee of the Immerman Foundation and the Robert S. and Sylvia K. Reitman Family Foundation. She also is a member of the board of directors of Sifco Industries Inc.

Rev. Hilton O. Smith

Rev. Hilton O. Smith, an ordained minister, is a senior vice president of Turner Construction Co., where he manages community and corporate affairs and educational programs. He is the former president of the Cleveland Municipal School District Board of Education, former chair of the Urban League of Greater Cleveland and on the board of numerous civic organizations. He holds a bachelor’s degree from St. Augustine’s College in Raleigh, N.C., received an honorary doctorate from David Myers University in Cleveland, is a certified labor relations manager through Cornell University and a certified community development manager through Boston College; and studied urban theology at Yale University.

Frank C. Sullivan

Frank Sullivan is the president and CEO of RPM International Inc. He held various commercial lending and corporate finance positions at Harris Bank and First Union National Bank prior to joining RPM as a regional sales manager. He serves on the boards of RPM International Inc., Timken Co., Greater Cleveland Chapter of the American Red Cross, Cleveland Clinic Foundation’s Digestive Disease Center Leadership Board, Rock and Roll Hall of Fame and Museum, Ohio Business Roundtable, and Greater Cleveland Partnership. He is a graduate of the Leadership Cleveland Class of 2001, a member of the Cuyahoga County Bluecoats, and a founding member of the Medina County Bluecoats chapter. He received his bachelor’s degree from the University of North Carolina as a Morehead Scholar in 1983.



Few families in the 92-year history of The Cleveland Foundation have been as influential as the Sherwins. On March 21, 2006, the day retiring chairman Jack Sherwin officiated his last board meeting, the Foundation dedicated its board room “to the legacy of the Sherwin Family, whose lasting impact on The Cleveland Foundation, the community foundation field and philanthropy in general will be felt for generations to come.” For nearly half a century, members of the Sherwin Family – including the only father and son to chair The Cleveland Foundation – have supported the community’s needs through their leadership. Clara and Jack Sherwin, with daughter Heather, joined in the dedication.



Talented and hard-working staff of The Cleveland Foundation dedicate their careers to the mission of improving lives of Greater Clevelanders.



Included in the leadership team at The Cleveland Foundation are Kathleen Stecky, human resources manager, James Bickel, director of technology, Margaret McGrath, chief of staff, Cynthia Schulz, director of public affairs, and Leslie Dunford, vice president for corporate governance and administration.

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**Carol A. Hellyar**  
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**Barbara J. Compton**  
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**Patty A. Takacs**  
Records Technician

**Joyce R. Wilson**  
Records Technician

As of June 1, 2006

\*Officers/Management  
Committee

Suite 1300 Services

Suite 1300 Services Inc., a nonprofit organization, works with and is funded by The Cleveland Foundation. It operates charitable programs and provides fiscal, administrative and technical assistance to community projects and initiatives, often in cooperation with nonprofit partners in the community.

**Leslie A. Dunford**  
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**Jean Lang**  
Staff Accountant

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**Cynthia Lewis**  
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**Omobola Lana**  
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**Erika Mason**  
Program Assistant

**FUND FOR OUR  
ECONOMIC FUTURE**

**Gwendolyn McDay**  
Fund Coordinator

diversity

The Cleveland Foundation is committed to diversity and inclusion in everything that we do. From our grantmaking to our donors to our staff, we strive to hear all voices and be fair and representative in all areas of our operations. Our statement on diversity reflects our commitment to keeping diversity at the forefront.

Statement on Diversity

The Cleveland Foundation exists to enhance the quality of life for all residents of Greater Cleveland. Our ability to achieve this mission and to foster a commitment to excellence can best be pursued if our workforce, grantees, donors, partners and governing body include individuals of diverse backgrounds, beliefs and perspectives.

The Foundation believes that diversity encompasses, but is not limited to, age, gender, race, national origin, religious beliefs, physical abilities and characteristics, sexual orientation, economic circumstances and lifestyle. Thus, the Foundation is committed to fostering a supportive work environment, which respects and

appreciates diversity in its many forms and provides all staff members with an opportunity to maximize the use of their work-related skills and talents.

The Foundation seeks to work with external organizations that reflect, as a group, the diversity of the Greater Cleveland community. We look for grantees and business partners that include individuals of varied backgrounds, beliefs and perspectives. We encourage all organizations with which we work to recognize and embrace the benefits of diversity.

Finally, in order to achieve the highest standards in all our activities, it is important that the Foundation benefit from the perspectives of many different segments of the community. Toward this end, we seek to collaborate with donors of varying means and interests. In addition, we encourage those individuals and organizations that appoint members to our board of directors to seek community leaders who will bring varying points of view to board deliberations.





**THE CLEVELAND FOUNDATION**

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