



## **FOR IMMEDIATE RELEASE**

Contact:  
Denise San Antonio Zeman  
President and CEO  
Saint Luke's Foundation  
(216) 431-8010  
[dzeman@saintlukesfoundation.org](mailto:dzeman@saintlukesfoundation.org)

**December 19, 2011**

### **SAINT LUKE'S FOUNDATION OF CLEVELAND REDESIGNS GRANTMAKING PROCESS, BOOSTS 2012 GRANT ALLOCATION BUDGET AND REALIGNS STAFF TO IMPLEMENT CHANGES**

***Larger and Longer-Duration Grants Intended to Promote Health and Well-Being  
Throughout Greater Cleveland's Vulnerable Populations***

**CLEVELAND** – The Saint Luke's Foundation of Cleveland will increase its grant allocation budget in 2012 in order to deepen the impact it makes with organizations whose work advances its mission. This increase, from an average of about \$10 million in recent years to \$12 million in 2012, is reflective of strategic changes approved by the board of trustees to the Foundation's grantmaking process, as well as its organizational structure.

During 2011, the Foundation's board and professional staff analyzed the organization's infrastructure, operations, mission and values, with a particular focus on identifying thematic areas where traction has been gained. Changing needs in communities that grantees serve were studied, as well as broader economic, demographic and societal shifts in Greater Cleveland and beyond. The board and staff also evaluated the Foundation's grantmaking policies and procedures as they relate to these changes.

**– MORE –**

## **SAINT LUKE'S FOUNDATION OF CLEVELAND REDESIGNS GRANTMAKING PROCESS, BOOSTS 2012 GRANT BUDGET AND REALIGNS STAFF, PAGE TWO**

As a result, the board approved a new grantmaking philosophy and process that ties grants directly to mission-driven criteria and outcomes over market-responsive criteria. Additionally, the board approved a \$12 million grant allocation budget for 2012, representing a 6.8 percent payout of the Foundation's 12-month rolling average of its investment portfolio. The grant allocation budget will be evaluated annually by the board.

The Foundation also plans to pursue larger and longer-duration grants with selected organizations in accordance with this new policy and approach. During 2011, the Foundation has issued more than \$10 million in grants for organizations throughout Greater Cleveland.

"A disciplined and thoughtful approach to grantmaking is essential for achieving the kind of impact needed to address the complex, changing needs of Greater Cleveland's vulnerable populations, and address the root causes of disparities in health and well-being," said Denise San Antonio Zeman, Saint Luke's Foundation of Cleveland President and CEO. "During times of great need, our old market-based spending policy dictated that we spend less. This new approach will provide a more predictable level of support for grantees, and it will enable the Foundation to provide more resources to organizations that demonstrate effective outcomes in the near term. We believe this will pay great dividends in the years to come."

Key elements of the Foundation's new grantmaking philosophy include:

- Narrowing its grantmaking scope to deepen relationships with community partners and in areas where it has gained traction and envisions potential for greater impact.

**– MORE –**

## **SAINT LUKE'S FOUNDATION OF CLEVELAND REDESIGNS GRANTMAKING PROCESS, BOOSTS 2012 GRANT BUDGET AND REALIGNS STAFF, PAGE THREE**

- Management of individual grants within three new program strategy areas: **Urban Health and Well-Being**, **Urban Community Revitalization** and **Urban Families**. Within each program strategy area, the Foundation will continue to provide support for discretionary grants, ongoing operations, programs, capital expenditures, and program-related investments. Grants will also be made for building organizational capacity in the areas of collaboration, communication, leadership development, outcomes and learning, and policy/advocacy. Previously, the Foundation organized grants into strategy areas distinguished by grant size and scope.
- An emphasis on leadership development and policy/advocacy as methods for realizing the Foundation's mission, in addition to communications, collaboration, and outcomes and learning.

Key elements of the Foundation's new grantmaking process include:

- Establishment of Program Strategy Committees for each of the three focus areas. These committees, comprised of board members and industry experts within each strategic area, will be charged with setting priorities for grantmaking, capacity building, and outcomes and learning.
- Elevation of responsibility for grant review and approval from the Foundation's Grant Committee to the full board of trustees in order to prioritize this core function of the Foundation's work.
- A streamlined online proposal-only application process that will provide the Foundation with a reliable and consistent evaluation tool. The new process will combine the Foundation's existing Letter of Inquiry and proposal process and require potential grantees to provide comprehensive detail at the onset of the grantmaking process.

**– MORE –**

## **SAINT LUKE'S FOUNDATION OF CLEVELAND REDESIGNS GRANTMAKING PROCESS, BOOSTS 2012 GRANT BUDGET AND REALIGNS STAFF, PAGE FOUR**

“We are striving to build a learning culture that fosters learning from and with our colleagues and our grantees, and utilizing the knowledge we gain to improve our collective impact in the community,” said San Antonio Zeman.

### **Staff Realignment Will Facilitate New Approach**

In addition to the establishment of Program Strategy Committees, the Foundation has realigned its professional staff in order to effectively manage this new grantmaking approach. Each of the Foundation's three program strategy areas will be managed by a Senior Program Officer.

LaTida Smith has been promoted to the position of Vice President for Programs, Outcomes and Learning. Smith joined the Foundation in 2003 and most recently served as a Senior Program Officer, where she directed the Foundation's responsive grantmaking portfolio in the areas of health and healthcare, human services and neighborhood empowerment. In her new role, Smith will be responsible for providing leadership and oversight for the Foundation's program strategies, grantmaking, outcomes measurement and learning in order to advance the Foundation's mission of improving and transforming the health and well-being of Greater Cleveland. Additionally, she will oversee the Foundation's Urban Families program strategy area.

Sandra Byrd Chappelle will serve as the Foundation's Urban Community Revitalization Senior Program Officer. Chappelle joined the Foundation in 2007 as Senior Program Officer – Transformational Initiatives.

The Foundation has initiated a search for a Senior Program Officer to oversee the Urban Health and Well-Being program strategy area.

**– MORE –**

## **SAINT LUKE'S FOUNDATION OF CLEVELAND REDESIGNS GRANTMAKING PROCESS, BOOSTS 2012 GRANT BUDGET AND REALIGNS STAFF, PAGE FIVE**

### **About the Saint Luke's Foundation of Cleveland**

Approaching its 15<sup>th</sup> year of grantmaking in the community, the Saint Luke's Foundation of Cleveland is a community-based private foundation that collaborates with nonprofit organizations and community leaders to address relevant issues and offer sustainable solutions in Greater Cleveland. The organization's mission is focused on improving the health and well-being of individuals, families and communities. Since 1997, when it was established with the assets from the sale of the Saint Luke's Medical Center, the Foundation has awarded more than \$81 million in grants in Greater Cleveland. Information on the work of the Saint Luke's Foundation of Cleveland is available on the Foundation's Web site: [www.saintlukesfoundation.org](http://www.saintlukesfoundation.org).

# # #

***Editor's Note:*** Representatives of the Saint Luke's Foundation of Cleveland are available for comment. Contact David Wasserstrom, Roux Creative, at (216) 403-7272 or e-mail [david@rouxcreative.com](mailto:david@rouxcreative.com).