Keep on Learning
15 Years of Lessons Learned
Writing a check to a grantee organization and then stepping back and waiting for results may seem easy enough for some foundations. But at Saint Luke’s Foundation, we don’t do that – nor could we even if we tried. Our roots emanate from the neighborhoods we served as Saint Luke’s Medical Center for more than a century, and still serve today as a private foundation. Our past and present work in these neighborhoods binds us with residents and key stakeholders, and it profoundly influences our ongoing relationships with them.

Likewise, we view our role with grantees as partners in the truest sense of the word. That involves honest dialogue – being willing to talk through issues openly. And it requires the kind of support from us that builds critical capacities and funds other vital organizational needs. In so many ways, we keep our light on so they can keep theirs on, too.

Our grantmaking has evolved to help nurture partnerships between the Foundation and grantees by facilitating communication before, during and after the issuance of grants. In the grant application process, we ask prospective grantees to select a specific performance area in which they will work, to describe the outcome they hope to achieve in that area, and to explain how they will go about achieving it. At the end of the grant period, we ask them to report whether or not they met their project goals, and to explain why they were successful or why they fell short. We ask them to share what they learned during the process and to suggest ways we can help them perform their work more effectively.

We also ask them what keeps them up at night – is it an issue related to strategy or personnel, or something as fundamental as making the next payroll? We know it can be difficult for grantees to speak honestly about issues like this with those who support their operations. But as long as we assume risk alongside them, we believe that candid, ongoing dialogue will help us serve them more effectively. Lastly, we ask grantees for advice we might pass along to other organizations. We listen, we learn, and we always try to improve.

Our commitment to the notion of community partnership doesn’t begin and end with grantees, though. Often, we will meet with prospective grantees, even if it’s apparent to us that the request does not fit with the Foundation’s giving criteria. During these meetings, we try to suggest alternate funding sources, connect prospects with outside resources – and yes, listen and learn.

When you do the kind of work we do, it’s hard not to become emotionally vested in the communities we serve. All of us at Saint Luke’s Foundation have our hearts in the game, big time. In the end, our success isn’t determined by internal metrics, but rather, by our ability to help grantees best serve the needs of their constituents.

“We view our role with grantees as partners in the truest sense of the word.”
Tune in.

Tell me and I’ll forget, show me and I’ll remember, involve me and I’ll learn.

I often recall this quote from Marla Jones when I think about the difficult challenges faced by communities throughout Greater Cleveland. It speaks volumes about the ways in which foundations, nonprofit organizations, institutions, and especially stakeholders can work collaboratively toward solutions.

Here at Saint Luke’s Foundation, we have the ability to support great work with the financial resources at our disposal, and the expertise of our dedicated board and staff. So where can our resources best be allocated? How much should be allocated? And will those resources address the root causes of the problems we seek to change?

We don’t have all the answers to these questions at the outset of our journey. But we aim for the truth by going right to the source. We say we are part of the communities we serve, and we mean it. So every day we roll up our sleeves and get dirty, whether through participating in neighborhood events and initiatives; hosting or attending forums; or networking with colleagues, grantseekers and organizational leaders in our target neighborhoods and beyond.

Our hands-on approach to community involvement extends throughout the Foundation’s ranks and lets us really get inside an organization to learn about the needs of those it serves. Our staff has volunteered for Habitat for Humanity, which offered a great opportunity to interact with members of the organization and the community, and to gain valuable insights. Likewise, Foundation staff members have volunteered at the Cleveland Foodbank, a longtime Foundation grantee. By doing so, we’ve seen the scope of this great organization’s operation up close and thus gained a better perspective on how it serves the vital needs of beneficiaries.

Finally, we work hard to heed the beneficiary voice — the people who ultimately are served by the organizations we support. We provide opportunities for genuine dialogue, we ask questions and listen to what residents say, and we support initiatives that promote solutions for residents — led by residents.

I am fortunate to bring a unique perspective to bear on this, given my work at the Foundation and my involvement as an advisory committee member of Healthy Eating Active Living, an initiative in the Buckeye, Woodland Hills and Larchmere communities that is supported by the Foundation. Through this, I have seen first-hand how listening and getting involved empowers people with a sense of ownership in a cause, attracts others to join them in their efforts, and ultimately works to transform Greater Cleveland neighborhoods in tangible and lasting ways.

“Tell me and I’ll forget, show me and I’ll remember, involve me and I’ll learn.”
I love learning. I’m naturally inquisitive, I always ask questions, and I believe that knowledge gained in any context makes me a more capable professional, and a better person. When I first heard that Saint Luke’s Foundation intended to become a “learning organization” in 2011, I was naturally excited. But initially, I thought that term simply meant reflecting on and assessing individual and collective performances at points throughout the year. As it turns out, the true meaning runs deeper.

Each day that we spend with coworkers, colleagues, family members and friends yields lessons. Really, there’s not a day that goes by in anyone’s life when learning doesn’t occur on some level. Yet organizations that embrace learning make it part of their DNA in order to continually transform themselves. For the Foundation, that meant building nationally accepted learning concepts into our organizational framework, including Systems Thinking, Personal Mastery, Mental Models, Shared Vision and Team Learning. To use these concepts, we must learn as we do our work – not just afterward – and learn from all that surrounds us each day of our lives.

This means talking with our grantees about their challenges – and listening to them – when they apply for grants, during site visits, throughout the duration of their grants, and even afterward. It means learning from experts beyond the Foundation’s walls who speak about important issues at events that we sponsor, as well as forums throughout Greater Cleveland and beyond. It means reading – lots of it – to gain insights. It means engaging community members and stakeholders in the neighborhoods we serve, asking for input on issues of concern to them, soliciting ideas, then using that information to improve what we do and to make a greater impact. And it means sharing what we are learning.

For me, personally, it also means engaging others within my circles, identifying my strengths and recognizing areas that need improvement.

Through learning, people and organizations evolve. For us at the Foundation, we embrace change and welcome the opportunity to evolve, both individually and organizationally. Yet we never lose sight of our mission – improving and transforming the health and well-being of individuals throughout Greater Cleveland – and because of that, we are strengthening that mission through learning in all phases of our work and our lives.

“We must learn as we do our work - not just afterward.”
In the years following the financial crisis of 2008, foundations and nonprofit organizations throughout the country faced enormous financial challenges. Saint Luke’s Foundation was no exception, and by the spring of 2011, we stood at a crossroads. Like many foundations, we spread our assets among a diversified mix of investments. Yet practically no investment is immune to fluctuations in global financial markets, so when markets in the United States and abroad declined in 2008, our asset base was correspondingly affected. And since foundations like ours traditionally allocated fixed percentages of assets to grantee organizations each year, we were forced to cut support for organizations at the very moment that it was most needed.

Our mission was in jeopardy. Many of our nonprofit partners were struggling. The time to act was upon us. And act we did.

To start, our Investment Committee scrutinized our spending policy top to bottom. We mined data; we turned to industry experts, colleagues and grantees for insights; we studied changing needs in our community; and we examined economic, societal and demographic shifts.

From there, our board convened to ponder the Foundation’s mission, infrastructure and approaches through a critical lens. We asked ourselves: Are we making a difference? What can we do better? How can we give more and have greater impact, especially in times of great need?

Ultimately, we narrowed our grantmaking scope in order to “go deeper” with community partners and in areas where the Foundation has gained traction and sees potential for impact. Today, this translates to a higher level of support for a smaller number of grantees, and the establishment and nurturance of relationships that reinforce learning together.

Our journey of Rethink, Redesign, Reinvent affirmed an important lesson for me: “In God we trust, all others must bring data” (W. Edwards Deming). Big-picture thinking helps organizations plan and strategize, but detail – particularly evidence – provides a rock-solid basis for action. We all have strong feelings about our Foundation and its place in our community. Yet intuition and emotion alone should never overshadow judgment supported by facts.

No matter what you set out to accomplish in your own journey, have the courage to evolve and transform, define your process, trust your leadership and execute your decisions. Clearly articulate your goals; delve into the details and work systematically to make sense of your findings; stick by your core principles; learn from others; and encourage all within your circle to express ideas and opinions openly, without apprehension or fear.

“Have the courage to evolve and transform, define your process, trust your leadership and execute your decisions.”
A key focus of our Healthy People program strategy is the reduction of obesity. If we could simply eradicate this epidemic with one large check, or a single stroke of programmatic genius, we would. But that is not possible. We don’t possess the necessary financial means. No one does. Nor do we have the insight, foresight or internal resources needed to quickly solve a problem of this immense scale and complexity.

Like all foundations, our expertise, our efforts – and yes, our money – will only advance our mission forward so far. Yet there are other ways to pursue our goals beyond the tactical issuance of grant awards.

One of the most important ways we have found to act on our mission is by collaborating with like-minded stakeholders and organizations early on – when we first identify a pressing community need as a priority.

Collaboration remains one of our core tenets, and we encourage foundations and nonprofit organizations alike to adopt it too. Connect with like-minded colleagues who work in your space and are passionate about moving the needle. Meet with them early on in your journey, build relationships, talk about your common interests, and determine how collaborative approaches can address the big challenges within that space that you each face. You may not utilize the same techniques or chart identical paths; but complementary approaches, coupled with planning, determination, open communication and mutual respect, can drive deeper overall impact.

Today, foundations of all types and sizes continue to learn from their work, evolve their thinking and approaches, and ultimately get better at what they do. The future of grantmaking won’t likely be dominated by large gifts from sole funders. Instead, we believe tough challenges will be met when funders and stakeholders forge meaningful collaborations, and assume productive and enriching roles within shared spaces.

This isn’t always easy, and some projects may still fall short of expectations, despite the best intentions of all involved. But by embracing a spirit of collaboration, we think you will discover what we have learned: Working together doesn’t eclipse us; rather, it augments our strengths, and it allows us to make great strides together toward common goals.

“Tough challenges will be met when funders and stakeholders forge meaningful collaborations.”
Leave no stone unturned.

Take a hard look at your principles and goals.

by Arthur Lavin, M.D., Board of Trustees

Foundations may appear to possess substantial resources with which to do good, but in most instances, our resources are minuscule relative to the size of the challenges we seek to address. Therefore, we must be mindful of what we choose to support, and how we support it, for there is so much that rides on our decisions.

Through my past work as chair of the Department of Community Pediatrics at Saint Luke’s Hospital and my current work on this board, I have interacted with community leaders and learned much about the needs of the neighborhoods we serve. Then and now, I continue to call upon first principles: identify needs and outcomes, channel resources in ways that drive lasting change, and measure the true extent of success.

Once a need is identified and pathways to success are charted, the only true matter of consequence left is the outcome. Is it more important to fund a pioneering initiative over staff training, or new computers for the office? If each example yields a similar outcome, then the answer is no.

We want to see impact. So often, impact is made possible through capacity building and agreed operating support. We can’t expect organizations to serve their constituents without infrastructure and overhead that can include everything from communications and marketing support to information technology, professional development – even office supplies, vehicles and rent.

I encourage other foundations to approach their work with a similar mindset. For nonprofit organizations, my message is two-fold: First, take an honest look at what could really drive your mission, be it equipment, training, current and future leaders, programmatic support or otherwise. Then, communicate your insights openly with potential funders. Help us learn alongside you; in the end, we’ll all be stronger.

Secondly, define your organization’s benchmarks for success up front. The pressure for foundations to quantify outcomes has grown tremendously in recent years. If we support a capacity building initiative, or any initiative for that matter, we owe it to the communities we serve to measure an organization’s performance relative to its benchmarks.

“Take an honest look at what could really drive your mission... then, communicate your insights openly.”
Bend, but don’t break.

Be nimble in advancing your mission.

by LaTida Smith, Vice President of Programs, Outcomes & Learning

Managing an organization to its highest potential means staying true to your mission while maintaining some flexibility in your approach. A strong organization understands its mission up front; believes in it; crafts a concise, clear and achievable mission statement to guide its efforts; and sticks to it. Yet just as rubber bands stretch and bend to bind items together, strategies that support an organization’s mission also should flex to meet changing conditions and evolving community needs.

Recently, we at Saint Luke’s Foundation reflected on our work and considered how we could best advance our own mission moving forward. Our conclusion: the mission remained relevant, but our approach needed to evolve. During my tenure with the Foundation, I have worked with many of our grantees to clarify the impact of their work. Now, having been tasked with doing the same for the Foundation, I have a much greater appreciation for just how challenging this can be. At each stage in our evolution as a foundation and our recent process to “Rethink, Redesign, Reinvent” our work, we studied, we learned, we evaluated and we shifted our strategies and tactics – all in an effort to better serve a mission that never changed.

Even the best-intentioned organization can start with a clear plan, but lose sight of the mission in the thick of the work. Funding constraints, changing community needs and the varying interests of stakeholders and partners challenge organizations to expand their scope and activities. Faithful adherence to a clear and compelling mission protects organizations from mission drift.

Still missions must be tested. Organizations must continually ask: Are our guiding principles still relevant? Does our reason for being still exist? And then evaluate, what’s the best use of the resources at our disposal in service of our mission? These tough questions challenge and stretch organizations and position them for greater impact with missions that stand the test of time and strategies nimble and flexible enough to adapt to those ever-changing conditions.

“Just as rubber bands stretch and bend to bind items together, strategies that support an organization’s mission also should flex.”
Embody your core values.

by Christie Manning, Senior Program Officer for Resilient Families

At Saint Luke’s Foundation, six core values guide our work: Respect, Leadership, Partnership, Courage, Results and Transparency. Each value represents a singular concept, yet they weave together to form an intricate mosaic. You can’t talk about one value without seeing its relation to another, and there is a richness in those connections.

I probably understood this on some level before I joined the Foundation as senior program officer for Resilient Families in January. But we take our core values to heart here, so my tenure at the Foundation has afforded me a deeper understanding of how an organization’s core values can live and breathe.

Take “Respect.” For us, this value manifests itself on many levels, from daily actions like showing up for appointments when we say we will and responding to correspondence in a timely manner, to valuing a diversity of opinion and perspective about our target communities and the world around us.

Then there’s “Transparency.” For me, transparency comes down to being honest with myself and others — about my intentions, my approach and my level of understanding.

It’s about acknowledging that I may not have all the answers; that I have made and will make mistakes; and that I continue to learn and improve my performance.

Respect and Transparency mean different things. But Respect arises through Transparency. Likewise, Transparency builds Partnership, because it supports the establishment of trust upon which partnerships are based. Trust takes Courage. Courage is an element of Leadership, and is often necessary to get Results.

Again, it’s a mosaic, and for me the central piece is Partnership, for it is in collaboration with others that we accomplish the most and become our best selves. It is in Partnership that we gain new perspective on our work, identify resources we can combine to achieve more, and build momentum together.

At the Foundation, our core values don’t collect dust. We have meetings specifically to discuss our core values in order to better understand what they look like when we exercise them in our daily work. Sharing this awareness of our values and revisiting them regularly helps us in our jobs, and in all aspects of our lives.

Identifying core values is a worthy endeavor. Don’t stop there, though. Live them, understand them more deeply and practice them every day. Yours may differ from ours; but the practice will enrich you just the same.

“Live them (core values), understand them more deeply and practice them every day.”
Recently, our board and staff sat down with representatives of the Legal Aid Society of Cleveland to review their grant application for general operating support. As we discussed the application with them, I posed a question that took everyone in the room by surprise: “Why aren’t you asking for more money?” This question cut to the heart of what we try to do at the Foundation – effect lasting change. Giving money is not about making us feel good; we feel good when we see something that works. In our meeting, the Society’s executive director made a case for the profound impact that legal issues can have on families. Legal service is expensive, yet low-income families need legal advocacy for a variety of issues. Therefore, if the Society’s programs work – if they make more families more resilient more often then I believe we should invest proportionally. Smaller grants still can have meaningful impacts. Given our mission, though, we don’t want to sprinkle a little bit here and there – we want roots to grow. Therefore, in 2011, our board adopted a new spending policy and changed the Foundation’s grantmaking policies to provide a higher level of support for a smaller number of grantees.

Choose carefully, and dedicate completely.

by Douglas Wang, Board of Trustees – Chair

How has it worked? It’s too early to draw definitive conclusions. Certainly, with fewer grants the stakes are higher. We’re playing championship tennis – to win, we must aim for the lines and not settle for the middle of the court. That entails risk, but the payoffs are real, and they can yield lasting victories.

In times of great need, nonprofit organizations rely more than ever on support from funders like Saint Luke’s Foundation. Relationships are key, so talk to us, or whomever your funding target may be, and not just about money. Let’s discuss strategy, let’s examine what’s really happening in the community, and let’s brainstorm ideas to address these challenges. Keep us informed about your work, and think about collaborations with community partners as well.

Finally, ask funders for the resources you really need to build a viable and scalable operation that serves pressing community needs. If you have great ideas and set achievable goals, we’re eager to listen – and maybe even offer some surprises in the process.

“Relationships are key, so talk to us, or whomever your funding target may be, and not just about money.”
In 2014, Saint Luke’s Foundation will relocate from Midtown Cleveland to the redeveloped Saint Luke’s Pointe, formerly the site of the iconic Saint Luke’s Medical Center in the Buckeye neighborhood. The Foundation will operate at Saint Luke’s Pointe, alongside the Harvey Rice School, The Intergenerational School (a high-performing charter school utilizing an intergenerational model), a relocated branch of the Cleveland Public Library, and a senior living facility.

Saint Luke’s Pointe is the ideal place for our Foundation to be. We established roots in the Buckeye neighborhood nearly a century ago, and our very existence is predicated on improving and transforming the health and well-being of residents in and around Buckeye. But Saint Luke’s Pointe is a large, complex redevelopment project that carries risk for everyone involved, including tenants. So while the fit seems natural, our willingness to assume risk alongside our community partners and stakeholders speaks volumes about the attitude and approach that defines our work.

Resolve to finish what you started.

by John O’Brien, Board of Trustees – Treasurer

Projects that are longer-term and more experimental often bring risk, yet the potential impacts can be profound.

This tenet guides much of our work at the Foundation. It can help you as well in charting pathways to growth and prosperity for your organization. Consider questions big and small through strategic planning or less formal assessments: What opportunities confront your organization, the community or communities in which you operate, and your beneficiaries? Where do opportunities lie? What kind of organization do you really want to be, and what is the best way to build that? Can you accomplish it through endemic growth, mergers and collaborations, or both?

In answering questions, be honest with yourself, keep an open mind, and follow through on your intentions. Whatever your plans may be, don’t expect results overnight. Give your programs and initiatives the time, space and resources they need to evolve and grow. Like the old expression says, “Slow and steady wins the race.” Set your pace wisely.
Lead the pack.

Position your organization for progress.

by Janet E. Burney, Board of Trustees – Vice Chair

Before Saint Luke’s Foundation, there was Cleveland General Hospital, the predecessor of Saint Luke’s Medical Center, which was founded in 1894 to serve the health care needs of residents in the Buckeye, Woodland Hills and Larchmere neighborhoods, as well as surrounding communities. For nearly a century, the hospital’s board of trustees functioned as a hospital board should, overseeing operations and growing capital.

In 1997, Saint Luke’s Foundation was established as a foundation with the charitable assets of Saint Luke’s Medical Center. While the Foundation’s mission stayed true to the long standing values of the hospital, in structure and substance, it had to evolve. As that occurred, so too did our board evolve.

Today’s board and professional leaders must position themselves on the cusp of change and integrate that mindset from the top down. At the Foundation, we work diligently toward that end by recruiting bright, engaged professionals for service on our board, as well as on our committees. We believe in “skill set” over “wallet biopsy.” That is, we attract board members with diverse backgrounds and skills who think both creatively and strategically. By doing so, they help us evolve with the times, proactively meet challenges, and in the end, better fulfill our mission.

The Foundation exists to serve the community, so our board members possess a great sense of community – they truly are committed to public service; they value opinions and perspectives with which they may or may not agree; they are willing to take intelligent risks; and they evaluate outcomes with honesty. Some even are current and past grantees; after all, who can lend deeper insight on the inner-workings of our target communities than the organizational leaders who administer the programs we support?

Each member of our board understands that having successful residents in our target communities advances our mission. There is no “us and them” attitude, and I believe great boards in all arenas pursue their missions with a similar spirit. Therefore, consider your current and prospective board members, and ask yourself: Do they bring diverse allegiances and motivations? Will they represent your organization well? Can they make a real difference, and do you believe they have the motivation to do so? Can they open doors that are currently closed? Take care in building a strong board – it will lead your pack toward a brighter future.

“Today’s board and professional leaders must position themselves on the cusp of change and integrate that mindset from the top down.”
Get on board.

Set a course for transformation.

by Heather Torok, Senior Program Officer for Healthy People

Budgets… they set limits for the what, when, hows and whys of what we do. From households, businesses and nonprofit agencies to governments large and small, nearly everyone and everything must operate within a budget. Foundations are no exception. At Saint Luke’s Foundation, we revised our grantmaking approach recently in order to provide a higher level of support for a smaller number of grantees. Still, we cannot end hunger or cure diseases with grants alone. Likewise, grant dollars will not fully ensure the vitality or success of the organizations and initiatives we support.

In this respect, our budget limits actually represent a blessing in disguise. How can this be? Unlike our budget, our voices are unencumbered by boundaries; they can carry us as far as we wish to go. Our finite grantmaking budget compels us to move the needle through means other than grants, so we focus significant attention and resources on advocating for important community issues, and enlisting public support for our causes.

Consider obesity, one of the key targets in our Healthy People program area. We support organizations and initiatives that strive to reduce obesity through policy-changing efforts and leverage neighborhood opportunities for healthier eating and more active living. This approach enables us to help agencies do the great work we believe so strongly in, while also creating a better societal infrastructure for healthier living.

Advocating for change can begin with one voice. When others join in, an exciting momentum can build. Fostering this requires many skills: vision, perseverance, diplomacy, trust and more. Sometimes, we need to lead from the front by bringing parties together – including funders, agencies and stakeholders – and getting the conversation started for systemic change. We also build understanding, consensus and support by leading from behind, which can look like collaboration, joining in and adapting to what works. In fact, we often find this to be the prudent course.

Whatever your approach, embrace your budget with grace and humility, no matter its size; build collaborations that have the potential to impact policy; tend to them with care; and keep everyone rowing in the same direction. Doing so will put the wind in your sails.

“Advocating for change can begin with one voice.”
Know your place.

Understand exactly where help is needed.

by Sandra Byrd Chappelle, Senior Program Officer for Strong Communities

According to recent public health data, residents of suburban Lyndhurst can expect to live up to a quarter-century longer than residents in a nearby Cleveland neighborhood, even though these East Side Ohio communities are located less than 10 miles apart. Place, it turns out, is literally a determinant of life and death in Greater Cleveland. A question we must ask ourselves is, “How do we bridge that gap?”

It’s often assumed that foundations write checks that enable grantee organizations to serve the needs of community beneficiaries. Yet at Saint Luke’s Foundation, we view our role, our grantees’ role, and especially the role of beneficiaries quite differently. One of our greatest responsibilities is to create opportunities that bring a cross-section of neighborhood stakeholders together, enable them to learn how policy shapes opportunity within their neighborhoods, and then provide the tools and resources they need to take action on their own behalf, in order to create healthier communities in which to live.

We know through experience that treating the symptoms of community distress won’t have lasting impact.

Conversely, addressing root causes of disparities in health and well-being, by promoting health and equity in all policies, fosters community ownership and engagement – and drives action.

Through our Strong Communities program area, we work with grantees and collaborate with philanthropic colleagues to promote healthy community design - things like safe housing, green space, clean air and water, access to healthy food and transportation, and quality educational experiences.

Sound public policy also ensures that neighborhoods are designed to help people make healthy choices, so we also lend a passionate voice to issues about which we care deeply, and we advocate for measurable change. Equally important, we work collaboratively with philanthropic and agency colleagues, grantees and beneficiaries to build county-wide capacity that addresses the root causes of place-related disparities and inequities.

Through our grantmaking, and our rich history of significant community partnerships in our target neighborhoods, we have learned so much – from our staff and board, community-based organizations, our colleagues, and especially residents themselves. Above all, we try to maintain a keen respect for community voice; we believe that real change occurs when stakeholders are involved in creating solutions through their combined experience, training and knowledge.

“Addressing root causes of disparities in health and well-being... fosters community ownership and engagement – and drives action.”
Managing and growing a foundation or nonprofit organization is, in many ways, similar to flying a commercial aircraft. Airplanes need pilots, supported by co-pilots, flight engineers, mechanics, cabin attendants, gate agents, security personnel and so on. Foundations and organizations also need pilots – specifically CEOs, presidents and executive directors. Like their high-flying counterparts, these pilots rely on others within their organization – their “inner support circle,” if you will – to help guide them in their journeys.

At Saint Luke’s Foundation, we are privileged to have strong leadership at the executive and board levels, as well as an inner support circle of staff and committee members who strategize, advise and implement. Early on, the Foundation recruited experts to its staff, board and committees who helped establish and maintain sound systems and practices. As chief financial officer, I can speak directly to the work of our Investment and Finance Committees, which has overseen the distribution of over $100 million in cumulative grantmaking through the end of 2013.

That’s $100 million toward making Greater Cleveland a healthier, more fulfilling place to live – due in large measure to smart financial planning and sound execution.

Our inner support circle played a crucial role in keeping the Foundation strong, financially and otherwise. Yet today, foundations and organizations rely more than ever on “external support circles,” including consultants, colleagues, governmental representatives and agency leaders, to augment internal resources.

I encourage you to build and nurture your circles of support, both inside and outside your organization. Inside, boards and committees need talented individuals with strong backgrounds in finance, law, accounting, social service, marketing and other disciplines. Enlist them in your cause, and empower them to act.

Beyond your walls, connect with organizations and individuals in the community who share your interests, and find ways to work collaboratively on issues big and small. Partnering isn’t easy; it takes patience, ownership, openness, compromise and trust. And of course, it’s always necessary to balance dreams with reality.

That said, flying in tandem – both inside and outside the “airplane” – can help you maximize resources, talents, energies and synergies, and in the end, soar ever higher.

“Build and nurture your circles of support, both inside and outside your organization.”
Shake it off.

Get back up and proceed stronger, wiser and better.

by Denise San Antonio Zeman, President and CEO

Making the wrong call can be costly – in money spent, time wasted and people impacted... or not! Yet mistakes happen. At Saint Luke's Foundation, we strive to make the right call every time. We carefully study needs in the communities we serve, establish clearly defined goals for the support we provide, align ourselves with people we believe in, and work hard to make measurable impacts.

That said, not all of our grants have delivered the results we had hoped for. Along our 15-plus-year journey, we have stumbled, faced challenges we didn’t anticipate, and traveled down paths we hadn’t foreseen. Sometimes, our errors were caused when passion trumped analysis. Other times, we overlooked obvious warning signs, we didn’t listen to those we should have, and we failed to act in a timely and decisive manner.

I have learned volumes from our work at the Foundation: Balance hopes and dreams with reality...Fund outcomes that correspond proportionately to the size and scope of your support, and establish indicators and checkpoints that accurately measure progress against those outcomes... Don’t be satisfied with mediocre leadership – great leaders produce great results, so invest in leadership development internally and for our grantees...Collaborate up front with our colleagues in the community and work together to tackle tough challenges. These are but a few of the lessons I have gleaned through our successes, and our failings.

The circumstances surrounding each of them may have been specific to our work, but the broader implications apply to organizations of many shapes and sizes. The greatest lesson of all: never stop learning from everything you do. When we succeed in an initiative, we analyze what worked, and why. When we err, we dust ourselves off, course-correct, and learn with an eye toward doing better next time. Often, mistakes lead to the greatest innovation! Likewise, learning doesn’t occur in a vacuum, so we maintain channels for grantees to share their outcomes and learnings with us along their charted paths.

No matter the mistake, we don’t stay down for long. When we get back on our feet, our mission-centric focus on improving and transforming the health and well-being of individuals and families throughout Greater Cleveland is sharper than ever.

“The greatest lesson of all: never stop learning from everything you do.”