AGENDA

1. Chair’s Report, Anthony Hiti
   A. Approval of the Minutes of the November 8th Meeting (p. 3-5)

2. Approval of 2019 Budget, Mike Cummins, Chair, Finance Committee, Tom Jorgensen, Chief Operating Officer
   A. Overview of Preliminary 2018 Results (p. 7)
   B. Review and Discussion of 2019 Proposed Budget

3. 2018 Year in Review, Kathleen Crowther, President & CRS Staff
   A. Staff Introductions (p. 9-18)
   B. Staff Report on 2018 Activities (p. 19-24)
   C. Discussion

Upcoming Board of Trustees Meetings:
Tuesday, March 19, 2019, 5:00 – 6:30 pm; location TBD
(Please note: this date is a change from the November Board meeting agenda)

Upcoming Events
Thursday, March 7th, Community Luncheon, 11:30 am – 1:30 pm
Wednesday, May 22nd, Celebration of Preservation, Playhouse Square theatre
Saturday, September 21, Annual Benefit Dinner, Harcourt Manor in Cleveland Heights, a private home
Call to Order – Tony Hiti.

A. Tony welcomed Councilman Michael Polensek. Councilman Polensek thanked the Society for its work in general and specifically for the Trustee and staff leadership in helping to save Longfellow School.

B. Tom Einhouse moved to approve the minutes for the September 6, 2018 meeting. Greg Frost seconded the motion and it was approved unanimously.

C. Tony thanked the Trustees for their support of the Annual Benefit at the Roundwood Manor. Unfortunately it was not as financially successful as was budgeted, but those that attended have a very enjoyable time.

D. Tony informed the Trustees of three recent Awards that CRS received: (1) Heritage Ohio, best Public-Private Partnership, (2) Shaker Heights Landmark Commission Preservation Award, Courtland House, and (3) Ohio History Connection, Courtland House.

E. Tony announced the Community Luncheon scheduled for March 7th, with speaker Maurice Cox, Planning Director, City of Detroit who has been using historic preservation as a focus for economic development and planning. CRS will also be recognizing Bracy E. Lewis with the Robert Gaede Award.

F. Tony asked the Trustees to support CRS through the Annual Fund Campaign. Unanimous board support is crucial as it is a requirement for some grants and sources of other funding.
II. **Longfellow School**

A. Kathleen Crowther and Councilman Michael Polensek provided a history and overview of the Longfellow School Project. It was operational as a school until 2006. The CMSD had every intention of demolishing the building and had sought bids for its demolition. Councilman Polensek landmarked the building, which prevented the demolition and allowed CRS to initiate a project to evaluate the building’s condition and attempt to save the building.

B. The value of the property is that it includes not only the historic building but three additional acres of developable land. The task force identified affordable housing as a redevelopment option. CMSD was eventually convinced to conduct partial haz-mat removal. With the partial haz-mat removal completed, CRS created an RFQ process for potential developers to evaluate the site and submit qualifications. Through that process, four developers were selected to submit proposals, and ultimately three developers submitted proposals. Vesta Corporation was selected.

C. Arne Goldman discussed the development company, Vesta Corporation, providing background on the company. Vesta’s financing is not dependent on state historic tax credits and therefore is able to secure financing faster. Total development costs include approximately $20 million in construction costs. Bill Hubbard explained the process by which the property was transferred from the CMSD to Vesta.

D. Wayne Mortenson suggested that CRS work to develop an ordinance or some other mechanism to ensure that CMSD does not walk away from other school buildings but implement some sort of mothballing procedure.

III. **18529 Winslow Road**

A. Margaret Lann provided a summary of the work that has been done on the 18529 Winslow Road rehabilitation project house. The porch has been rebuilt, roof and gutters were replaced to code, and drainage to remediate basement water was completed. Bids have been secured for new storm windows and driveway replacement. The total cost incurred to date is $75,882. Once the exterior issues are completed, the property will be listed for sale with the intention that the buyer will complete any interior renovations.

IV. **Task Forces**

A. Tony Hiti and Scott Holbrook discussed the establishment of two Task Forces, one for the Luther Moses House and the other for the Dall-Mays Houses. They are tasked with tarping the houses to protect them from weather damage and to address other immediate needs to protect the homes from further deterioration. The long range plan is to clean out the houses and find an opportunity for someone to take them over and facilitate transfer of ownership. The Trustees were asked to consider volunteering to serve on either task force.

V. **Executive and Finance Committee Reports**

A. Tom Jorgensen and Kathleen Crowther provided reports on: 1) the financial forecast for the year; 2) success of Heritage Home Program; 3) the refreshed website; 3) open staff positions; 4) grant request to the National Park Service; and 5) revised nomination of Roundwood Manor to the National Register of Historic Places.
VI. There was no new business.

Adjourned.

Minutes respectfully submitted by Bill Hubbard, Board Secretary.
Cleveland Restoration Society  
Budget for 2019

<table>
<thead>
<tr>
<th></th>
<th>2017 Results</th>
<th>2018 Budget</th>
<th>2018 Results (Actual through 9/30/18 and forecast through 12/31/18)</th>
<th>2019 Budget</th>
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<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Fees &amp; Public Grants</td>
<td>480,613</td>
<td>405,298</td>
<td>419,312</td>
<td>447,519</td>
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<td>Private Grants</td>
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<td>575,294</td>
<td>582,817</td>
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<td>Other Income</td>
<td>48,528</td>
<td>66,000</td>
<td>66,000</td>
<td>70,000</td>
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<tr>
<td><strong>Total Income</strong></td>
<td>1,247,396</td>
<td>1,239,842</td>
<td>1,251,570</td>
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<tr>
<td><strong>Expenses</strong></td>
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<tr>
<td>Direct Costs</td>
<td>414,766</td>
<td>393,761</td>
<td>405,704</td>
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<td>Property Related Expense</td>
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<td>Staffing Expense</td>
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<td>824,707</td>
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<td><strong>Total Expense</strong></td>
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<td>1,312,124</td>
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<tr>
<td><strong>Net Income</strong></td>
<td>(41,737)</td>
<td>(77,826)</td>
<td>(60,554)</td>
<td>(70,478)</td>
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<tr>
<td>Add Back Depreciation</td>
<td>89,216</td>
<td>88,220</td>
<td>88,220</td>
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<tr>
<td>Adjusted Net Income</td>
<td>47,479</td>
<td>10,394</td>
<td>27,666</td>
<td>15,522</td>
</tr>
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</table>
Stephanie Allen joined Cleveland Restoration Society in 2016 as the Marketing and Events Manager. In this role, she is responsible for the marketing and production of signature programs including the Community Luncheon, Celebration of Preservation and the annual benefit. She produces several small member events throughout the year including SNOOP! tours of local historic preservation projects. Ms. Allen is responsible for community outreach and media relations. During her tenure, CRS programs and events have been published extensively in both local and regional news media.

Prior to joining CRS, Ms. Allen worked at the Gordon Square Arts District where she was involved in neighborhood planning and promotion. She worked with the Cleveland Institute of Art to create original designs for traffic boxes and also collaborated with the Cleveland Metroparks on wayfinding that connects the neighborhood to the waterfront.

Ms. Allen is a graduate of San Francisco State University with a degree in Industrial Arts and Design. She was a fellow with National Endowment for the Arts and continues her studies through nonprofit classes at Cleveland State University.
Jessica Beam joined the Cleveland Restoration Society as a Heritage Home Program℠ (HHP) Assistant in September 2018. She works within the Heritage Home Program℠ scheduling site visits, responding to inquiries, processing loans and contracts, and providing color consults to homeowners. Jessica also assists with other events, programs, meetings, and workshops provided by the HHP and CRS in communities across Northeast Ohio.

Prior to working with CRS, Jessica worked as a Park Ranger for the National Park Service at James A. Garfield National Historic Site. With the National Park Service, she worked as an interpreter, educator, and helped maintain the historic property. Jessica taught educational programs at elementary schools across northeast Ohio and helped facilitate field trips and special programs at James A. Garfield National Historic Site and Cuyahoga Valley National Park, as well as giving talks locally about various aspects of 1850s-1900s culture and architecture.

Jessica is a recent graduate of Ursuline College in Pepper Pike, having earned her M.A. in Historic Preservation in May of 2018.
ELIZABETH CARDARELLI

HERITAGE HOME PROGRAM℠ TEAM LEADER

Elizabeth Cardarelli joined the Heritage Home Program℠ staff in November of 2015 as a Heritage Home Program℠ Assistant. Elizabeth transitioned to the role of Heritage Home Program℠ Associate in January 2016. She was promoted to Heritage Home Program℠ Team Leader in January 2019. Elizabeth assists homeowners through the loan application process from start to finish, providing preservation based guidance on all aspects of home improvement and repair. Elizabeth creates and presents educational workshops and is active with Heritage Home Program℠ community outreach. She also manages reporting to participating communities and contributes to CRS publications such as Facade and Field Notes.

Prior to working for CRS, Elizabeth was employed with the Western Reserve Historical Society at Hale Farm and Village. There she worked as an educator and assisted in restoration projects taking place in the historic houses. She also served as historic preservation intern at Hale Farm and Village during summer 2013.

Elizabeth completed her Master of Science in Historic Preservation at Roger Williams University in Rhode Island in 2014. In 2017, Elizabeth earned a Certificate of Interior Design from the New York Institute of Interior Art and Design.
Michael Fleenor is Director of Preservation Programs & Services. In this role, he manages several programs, including CRS’s fee-for-service activities. He builds relationships throughout northeastern Ohio and works with government and community development leaders to use heritage and historic preservation as a community revitalization tool. Michael consults on various issues, such as reviewing preservation ordinances and landmark review procedures. He has developed building assessments, preservation plans, requests for proposals and specifications for bid. Michael manages CRS’s survey projects and efforts to designate historic resources. Michael has led the organizational initiative to document Cleveland’s rich African-American history through survey work and conducting oral history interviews. Through these community engagement efforts, he has been able to diversify the listing of Cleveland landmarks and historic districts and to build a stronger historic preservation constituency in previously under-represented neighborhoods.

Michael provides technical assistance to the stewards of sacred landmarks and directs CRS’s steeple lighting projects. He also staffs CRS’s Sacred Landmarks Assistance Initiative and Advocacy & Public Policy committees. Michael manages all real estate projects undertaken by the organization.

Before moving to Cleveland in 2000, Michael worked for as a preservation consultant and on the staff of the Tennessee Historical Commission, where he administered major maintenance, restoration, and capitol projects at the state-owned historic sites. Michael has a B.S. in English Journalism, an M.A. in Educational Psychology, and an M.A. in Public History, with an emphasis in Historic Preservation.
DEBRA GULICK

BUSINESS & ACCOUNTING MANAGER

Debra is an accounting professional with over 30 years of experience. As business and accounting manager, her duties include budgeting and reporting on operating and restricted funds to the treasurer, trustees, and funders and managing annual audit of financial statements. She records all receipts and expenditures using the QuickBooks Accounting Software System.

Debra has prior construction and real estate experience working with the Ozanne Construction Company and the Shaker Lakes Apartment Company, along with other organizations. Her insights on managing the finances of real estate are a boon to CRS.
Emma Kopp joined the CRS staff in September 2018 as a part of the Heritage Home ProgramSM team. She serves in various capacities within the Heritage Home Program including scheduling site visits, answering homeowner inquiries, and processing loans and contracts. Additionally, she assists with various events, programs, and workshops in conjunction with HHP and CRS across the Greater Cleveland area.

Prior to working with the Heritage Home ProgramSM, Emma gained experience in the nonprofit sector through an internship with the Ohio City-based organization Linking Employment, Abilities, and Potential (LEAP). There, she was a job coach for high school students with disabilities.

Emma is a recent graduate of Denison University, where she earned her B.A. in Anthropology/Sociology and Religion this past May.
Margaret began her career at CRS in May 2013 as a part of the Heritage Home Program™ team. Her duties included facilitating the home loan process, providing on-site technical assistance, and advising homeowners regarding preservation practices. Margaret was responsible for reporting to program partners and engaging the community through public programs and educational workshops. By 2016, Margaret became the program manager. As Manager, Margaret acquired additional responsibilities that included hiring and training staff, managing internal operations and engaging with potential partners to introduce the program.

As of October 2017, Margaret became the Manager of Development and Publications. In this role, she is responsible for the continued development of the Heritage Home Program™, including outreach to potential partners. Margaret facilitates donor stewardship, oversees grant proposals and reporting, and edits our preservation publications, including Facade.

Margaret remains involved with community outreach and enjoys creating educational workshops, giving presentations, and representing CRS at area events. Margaret is an advising member of the Franklin-West Clinton Design Review Committee, and a member of the Cleveland Heights Landmark Commission. Margaret holds a Master’s of Arts in Historic Preservation from Ursuline College.
DEAN PAVLIK

PRESERVATION
CONSTRUCTION MANAGER

Dean Pavlik joined the Cleveland Restoration Society in July 2015, bringing forty years of hands-on construction expertise to our Heritage Home Program℠. Dean uses his practical experience to consult with homeowners who are participating in the program to answer their questions on a variety of home improvement topics, from basic maintenance to detailed project planning. He works as an intermediary between contractors and homeowners.

Prior to joining the CRS Heritage team, Dean completed historic residential rehab projects as a private contactor, primarily in the Shaker Heights area. He has worked on projects throughout all phases of remodeling.
SOPHIA SZELES

DEVELOPMENT AND MARKETING ASSISTANT

Sophia Szeles joined the Cleveland Restoration Society as a Development and Marketing Assistant in January 2019. She works within the Development department, assisting with event planning, fundraising, and memberships. Sophia also assists with writing and editing grant proposals, the monthly email newsletter, Perspectives, and our semi-annual magazine, Facade.

Prior to working with CRS, Sophia gained nonprofit experience in her role as an intern for the Southwest Community Health Foundation, where she wrote grant proposals to secure funding for hospital programs and new medical equipment. During her undergraduate studies, Sophia worked with the Cleveland Kids’ Book Bank and the LGBT Community Center of Greater Cleveland to secure funding to support child literacy and youth programming.

Sophia is a recent graduate of Baldwin Wallace University, having earned her B.A. in Public and Nonprofit Management in December of 2018.
Audrey Thomas joined the Cleveland Restoration Society as a Heritage Home Program® (HHP) Associate in October 2018. Through her position in the Heritage Home Program®, Audrey provides assistance to homeowners as they navigate the loan process, conducting site visits, processing applications, and advising on preservation standards. Audrey also supports the HHP and CRS staff on other events and programs.

Prior to working for CRS, Audrey worked as the Director’s Assistant at the Truro Historical Society in Truro, MA. Here, she assisted the Museum Director in maintaining daily operations of the Highland House Museum and worked in the Society’s archives, accessioning and cataloging donations and items from the collection. Audrey also worked as an Intern for the Foxfire Museum and Heritage Museum in Mountain City, GA, where she conducted historic research in the organization’s archive, led museum tours, assisted in the development of a new exhibit, and digitized visual and audio media.

Audrey is a recent graduate of the University of Georgia, having earned her M.A. in Historic Preservation there in May of 2018.
Cleveland Restoration Society
High Level Summary of Accomplishments
2018

A Reflection: Ten years ago today, CRS faced the Great Recession with creativity and courage. Upon reflection, we can be proud of our strategic responses that have enabled the organization to flourish in the face of disaster. How did we do it?

- By finding new ways to create value for our Heritage client communities in the face of the mortgage crisis and plummeting property values. We created Preservation Services, all manner of preservation consultation, to help communities where and when they needed it. Preservation Services now accounts for 13% of CRS’s budget and is conducting groundbreaking work in our community.

- By reconceiving the primary purpose of the Heritage program to be “general old-house assistance” from “pure preservation.” Our goal now is to help residents remain in the older homes of our communities. In 2018, technical assistance was provided to 1,759 residents for old-house matters valued at $41MM. Based upon survey results, we estimate 70% of this work has been, or will soon be, completed.

- By redesigning the Heritage pricing system to reduce participation fees. This action resulted in a resurgence of Heritage community sign-up. In 2018, Heritage program fees were paid by 42 cities outside of Cleveland, 16 out of 17 wards of Cleveland, and in Lucas County under a franchise agreement. This, together with fees paid by our loan clients (modest escrow and technical assistance fees), account for 33% of our budget.

- By focusing on financial security, as always, and part of our organizational DNA. The Great Recession precipitated a small staff reduction to an already lean staff, but the preservation staff was prioritized and retained. Trustees stepped up with increased financial support and donations of professional services. Members increased their Annual Fund contributions. And CRS took measured risks with two historic properties that sold and added almost $200K to the budget.

CRS attained something remarkable – it did not simply “survive” the Great Recession of 2008, it “thrived” to become today’s stronger and more relevant and innovative organization.

Big Picture Highlights

- CRS continues to play a leading national role in its field. CRS hosted the Midwest Advisors of the National Trust for Historic Preservation in Cleveland and is a founding member of the new National Preservation Partners Network.

- On the global heritage front, CRS’s President was elected as Secretary General of ICOMOS’s International Scientific Committee on Historic Cities, Towns and Villages. ICOMOS is the International Council of Monuments and Sites, an association of heritage experts. CRS shared its programs with international visitors from Serbia and Mexico.
CRS weathered the transitioning of several young professional staff members out of the organization for graduate school and better jobs at larger organizations. This was managed through an organizational-wide “pinch hitting” strategy and through greater leverage of technology. So far, minimal fallout.

CRS again expects to close the year with a small surplus of $27K. City of Cleveland reimbursed CRS $153K four and five months after the completion of its contract; the worse ever in years of contracting challenges.

CRS’s “big three” events and many smaller ones attracted over 3,200 participants and 42 financial sponsorships.

The CRS-led three-year effort to save Longfellow School from demolition has come to a close. By year end, a highly qualified developer will have taken title to the property with the expectation of completing a $21MM project to provide 94 affordable senior housing units.

The Heritage Home ProgramSM had another record-breaking year by responding to 4,215 inquiries, making almost 1,400 site visits for projects valued at $40MM and booking 138 loans for almost $8MM. All this despite staff turnover!

The Lee-Harvard Cultural Heritage project continues to yield remarkable historical information. This year, we discovered additional African American builders and entrepreneurs whose lives are a testimony to their success as businessmen and civil rights activists.

CRS sourced a second small-deal tax credit investor to fulfill its commitment on the Bristol Apartment House. We hope to close by year end.

CRS revamped its magazine Façade through refreshed graphics, additional in-depth articles, and an increased page count. The changes have been well-received.

CRS’s webpage and the Heritage Home webpage have been updated for greater usability and mobile device usage. All of this was done in-house, saving the expense of an outside consultation.

CRS’s Sacred Landmarks Committee continues to be a model of experts donating their time and expertise for pro-bono technical assistance. During 2018, twenty (20) congregations were assisted and a training workshop rolled out.

CRS increased its work in historic properties by accepting the ownership of a double house in Shaker Heights and by agreeing to stabilize three highly significant landmarks in Cleveland: the two Dall-Mays houses on E. 46th Street (Central) and the Luther Moses House on Lexington Avenue in Hough.
Heritage Home Program℠

✓ A big step forward was attained by programming our Salesforce software to enable customers to schedule a site visit on-line. Automating site visits schedules of our two construction specialists has been transformational, reducing customer wait times and increasing service. The system generates confirmation emails and thus communication with customers is improved. Wait times for CRS response have been eliminated and requests for site visits are increasing.

✓ This dive into the Salesforce software capability has opened the door for CRS to further automate its program to optimize customer service.

✓ CRS heritage staff convened 33 meetings on the program in-the-field. Just under 300K direct mail pieces were sent to all eligible households in the participating communities.

Advocacy

✓ CRS has been the primary community advocate for Roundwood Manor (Hunting Valley) whose owner seeks a zoning variance to enable a condo conversion of this country lodge built by the Van Sweringen brothers in 1923-27. Since initiating this work in 2016, CRS has attended numerous meetings, listed the property into the Ohio Historic Inventory and the National Register of Historic Places, sponsored a dinner and benefit there, and has written about the manse in a cover story for Façade.

✓ Submitted first draft of a nomination of the Scofield Mansion to the National Register of Historic Places. The nomination is under revision to comply with a new format and will be completed by early 2019.

✓ CRS continued to review the City of Cleveland’s demolition pipeline list to pull historic properties we think should be spared and receive special consideration. This year, CRS received increased funding for this work ($25k vs $15K). Over 342 properties have been reviewed and the majority have been mapped.

✓ CRS staff attended 20 of 24 Cleveland Landmarks Commission meetings. Staff also served on the Ohio City Design Review Board, Franklin West Clinton Design Review Committee, and the North Olmsted Landmarks Commission. As appropriate, CRS staff attended City-Wide Design Review Committees, Planning Commission, and City Council Sub-Committees meetings.

Membership and Community Engagement

✓ CRS’s “big three” programs – the Community Luncheon, awards program (Celebration of Preservation) and annual benefit – continued the tradition of aligning the organization’s mission with events that engage and attract participation and raised just under $57K.

✓ The Community Luncheon attracted 270 people, netting almost $25K into the budget. We hosted a post-program discussion on the impact of the changes to the historic tax led by Merrill Hoopengartner of the National Trust Community Investment Corp. This invitation-only session
drew 30 experts for an in-depth discussion.

✓ The awards program was well-attended (300 people) with 15 dazzling projects feted in the fun party ensuing. The program generated proceeds of $15K. Sherwin Williams was retained as a $5,000 sponsor by working with both their foundation and marketing departments.

✓ “The Country Life in Daisy Hill” benefit reinforced our relationship with Roundwood Manor and our work on its nomination to the National Register of Historic Places. Although smaller in size with 100 guests, we managed to net $17,400 profit. We featured articles an in-depth keepsake program and added a small auction that generated an additional $2,375.

✓ Staff produced 12 monthly e-newsletters, Perspectives, 50 stand-alone email blasts on various events and advocacy matters, and engaged with constituents through 73 posts and shares on Facebook.

✓ Created a 2017 Annual Report as a stand-alone publication, highlighting the work of the previous year. This report was also used for marketing and membership solicitation.

✓ Smaller events included a sold-out bus tour with Todd Michney highlighting our work in Lee-Harvard; sold-out SNOOPS at the Cleveland Athletic Club, the College Club, The Veronika and Scofield Mansion; and a presentation “Repurposing Sacred Landmarks” at the Cleveland Public Library downtown. Each garnered media coverage to promote our mission to an expanded audience. Almost 300 people directly benefitted.

✓ CRS led the design and production of the Cushman & Wakefield/Cresco Real Estate 2019 calendar, this year focused on historic preservation, and mailed to over 4,000 individuals, including CRS’s members and funders. The calendar promoted northeast Ohio projects and CRS’s mission.

Lee-Harvard Cultural Heritage Project

✓ Identified three additional African-American builders - Rufus Ranaldson, William Woodridge, and Albert Taborn. Completed first draft biographies of each and documented 75 of their properties by entering each into Ohio Historic Inventory.

✓ Organized four Black builder tours: National Trust Advisors, Board of Trustees, public bus tour and CRS staff.

✓ Completed seven oral histories facilitated by Dr. Michney and documented in film by the Cleveland Public Library.

✓ Initiated nomination of the Myrtle-Highview Historic District to the National Register of Historic Places Nomination to be formally submitted in February, 2019.

✓ Worked on the CRS capstone publication by outlining subject matter with associated photographs; acquisition of additional photographic images from local public and private collections; scanning of materials as needed; and drafting of copy.
Sacred Landmarks

✓ Provided free technical assistance to twenty (20) sacred landmarks, including two comprehensive site visits by the Sacred Landmarks Support Committee to Eastview United Church of Christ and St. Aloysius Catholic Church. Continued to monitor progress on multiple churches engaged with the program.

✓ Illuminated the steeple of St. Andrew Kim Korean Catholic Church with a grant of $20,100 from the Reinhold Erickson Fund of the Cleveland Foundation. Secured an eighteen month extension of our grant while we await Iglesia El Calvario to raise needed funds for tower repairs.

✓ Sponsored a public workshop on sacred landmark maintenance with 40 individuals in attendance. Three new congregations requested comprehensive building assessments during 2019.

Small Deals

✓ On December 31, 2017, CRS closed on its first “small deal” by providing a $240K investment in the Gund Brewing Building at 2030 W. 25th Street. Long in the making, the closing was spurred on by looming tax credit program changes.

✓ By May, 2018, CRS’s corporate investor declined a second small deal that it had previously approved, throwing CRS for a loop. Remarkably, CRS quickly found a replacement investor, and is about to close its second deal, the Bristol Apartment building, a 20‐unit building in the Shaker Square Historic District.

✓ CRS faced severe criticism from outside deal parties for its decision to keep the identity of its new investor confidential. Curiosity ran high as did resentment at being unable to access this information. In the end, CRS’s position was accepted and we successfully held our cards close‐to‐the‐vest.

✓ CRS developed a strategy and presentation for a multi‐corporate fund along the lines first envisioned. We expect to have therefore two ways to invest in small deals – with direct investors and via a multi‐corporate party fund.

Historic Properties

✓ The house at 18520 Winslow Road in the Winslow Road Historic District of Shaker Heights has been hugely improved through the rebuilding of the front and rear porches, complete rebuilding of the chimney, an attractive exterior painting, new roof and impending new heating systems. CRS is spending more money on the property that expected but intends to break even at sale.

✓ Task forces were initiated for the stabilization of the Luther Moses House and the Dall‐Mays Houses. Roofing tarps were installed at these properties to safeguard them from winter rain and snow.
Financial Resource Development

- Managed two annual fund campaigns raising over $83K YTD (12-28-18). Pursued an online donation throughout the month of November directed at general members in addition to segmented mailing lists for letters. Initiated the fall annual fund earlier than previous years in an attempt to secure funds within the fiscal year.

- Initiated a Lapsed Member drive in March, mailing to just under 400 individuals and businesses. Simultaneously initiated a more consistent membership renewal system. Over the 2 months immediately following these initiatives, over 50 members renewed. In the last 12 months, 276 members have either renewed or joined, an increase of 83 members since this time last year. Individual and Household Membership ($35 and $55) generated over $15K YTD (12-28-18), an increase of $3K since this time last year.

- Continued CRS tradition of excellent relationships with funders. Proposals were successfully submitted to the Cleveland Foundation, Cuyahoga Arts and Culture, George Gund Foundation, Ohio Arts Council, 1772 Foundation, Ohio Historic Preservation Office, and Ohio Development Office. Two highly competitive requests have been made to the Ohio History Fund and the National Parks Service. We will find out the results of these proposals in 2019.

- Secured funding from the OHPO’s Certified Local Government grant program to survey homes developed by African American builders and to complete a National Register Nomination of the Arthur Bussey Historic District.

- Many additional obligations for grant compliance were met that included letters written to legislators, website updates, lists of project data, and publicity requirements.

Draft December 28, 2018