1) Chair’s Report, Scott Holbrook
   a) Approval of the Minutes of the December 2, 2021 Meeting
   b) Brief Update on Dall-Mays properties

2) 2021 Year End Report and Presentation by the Staff of Cleveland Restoration Society
   a) Introduction, Kathleen Crowther, President
   b) Presentation – Full staff, see biographies attached
   c) Discussion

3) New Business

4) Old Business

Upcoming Board of Trustees Meetings at 5 pm:
Tuesday, March 22
Tuesday, May 17
1. Adaptive Use of Cleveland's Historic Schools with Special Guests.

Kathleen Crowther introduced guests from the City and the Cleveland Metropolitan School District. Kathleen explained CRS's involvement with CMSD over the years, including work on the Longfellow School Project. Councilman Polensek requested that CRS convene a task force to evaluate the ability to repurpose the school building. The task force met 45 times over three years. The task force drafted a request for qualifications to developers and then proceeded to evaluate three proposals from developers, ultimately selecting Vesta as the developer. It is instrumental that the CMSD was able to repurpose demolition money for the remediation of asbestos.

CMSD has since brought the Longfellow Project to scale and used it as a template for other projects. Patrick Zohn, Patti Choby, and Trudy Andrzejewski provided an overview of the process that CMSD has gone through to evaluate and market a number of its properties. The need to dispose of real estate stems from the fact that at one time CMSD served 140,000 students, but now serves only 35,000. CMSD's priority is educating students and not serving as a real estate developer. On average, CMSD spends $100,000 per year to maintain each abandoned property. To the extent those properties can get off their books, it is an immediate savings.
They explained that the Longfellow project was vitally important because it helped the CMSD Board of Trustees to realize that such projects could work. As a result of that initial success, they were more willing to embark on similar projects to dispose of additional properties.

They took the Longfellow concept to scale by grouping properties together and offering them to developers. For 19 properties, they received 51 responses, many of which are from out-of-state developers. They credit the project’s success to its scale. The number of properties being offered garnered much more attention than had they been offered one at a time.

They employ a three-phase process, which allows CMSD and the developer to proceed without any commitment until they both feel comfortable that project can succeed. That allows CMSD to maintain oversight of the project and control of the property as long as possible and keeps the property from going to a developer that might otherwise allow it to languish.

2. Chair’s Report, Scott Holbrook
   A. The minutes for the October 12, 2021 Meeting were reviewed. Rev. James Quincy moved to approve the minutes. Tony Hiti seconded the motion and the minutes were approved unanimously.
   B. Scott reminded the Board of the Community Luncheon scheduled for Cory United Methodist Church, which would include the unveiling of the first civil rights marker. Scott informed the Board that sponsorships and tables were still available for purchase.

3. Finance Committee Report – Mike Cummins, Treasurer, and Tom Jorgensen, Chief Operating Officer
   Mike Cummins and Tom Jorgensen provided a report from the Finance Committee. They reviewed the 2022 budget which shows a loss of $161,567, but also explained that the anticipated sale of the Parks residence for an estimated $226,500, will offset any operational losses. Jonathan Sandvick moved to approve the 2022 budget. Elizabeth Corbin Murphy seconded the motion and it was approved unanimously.

The meeting adjourned at 6:30.

Minutes submitted by Board Secretary, Bill Hubbard.
REGINA ANDERSON

HERITAGE HOME PROGRAM<sup>SM</sup> ASSISTANT

Regina Anderson joined the staff as a Heritage Home Program Assistant in 2020. Through her position in the Heritage Home Program<sup>SM</sup>, Gina assists homeowners as they begin renovation projects by providing information, answering questions, and scheduling site visits. Additionally, Gina supports the HHP and CRS staff on events and programs.

Gina is a certified urban planner and brings along experience working in large cities, rural areas, and engagement with diverse communities in addressing property needs and revitalization. Gina has worked on and managed renovations in her own older houses. Gina has long engaged in diversity and race training, most recently with small-cohort intensive group work aimed at relational transformation among participants.
LINDA BARBERO
HERITAGE HOME PROGRAM ASSOCIATE

Linda Barbero joined the Cleveland Restoration Society as a Heritage Home Program℠ (HHP) Associate in October 2021. Through her position in the Heritage Home Program℠, Linda provides assistance to homeowners as they navigate the loan process, conducting site visits, and processing applications. Linda also supports the HHP and CRS staff on other events and programs.

Linda currently serves on the Lakewood Heritage Advisory Board, and the Lakewood Historical Society Board of Trustees. Prior to working for CRS, Linda co-Chaired the Interior Design Department at Virginia Marti College, where she taught architectural history and design, and later worked as an interpreter at Historic Roscoe Village. She had her own architectural model building business, and worked in planning and architectural firms.

Linda is a 2016 CSU graduate with a MPA & Historic Preservation Certificate. Her bachelor degree is in urban planning from the University of Cincinnati.
Jessica Beam joined the Cleveland Restoration Society as a Heritage Home Program© (HHP) Assistant in September 2018 and transitioned to HHP Associate in 2019 and was then promoted to the role of to HHP Manager in 2021. She works within the Heritage Home Program© and provides preservation based guidance on home repair and improvements projects. Jessica manages reporting to participating communities and organizing programs, meetings, and workshops provided by the HHP 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 graduate of Ursuline College in Pepper Pike, having earned her M.A. in Historic Preservation in May of 2018.
Anne Doten joined the Cleveland Restoration Society in February 2020. She has over twenty years of experience in the nonprofit sector, including five years at a National Historic Landmark in Miami, Florida, where she secured and managed several million dollars in first-time federal grants from the National Park Service, the Federal Emergency Management Agency (FEMA), the National Endowment for the Arts, the National Endowment for the Humanities, and the U.S. Fish & Wildlife Service. In 2021, Anne worked with her colleagues at the Cleveland Restoration Society to secure a $500,000 grant from the National Park Service, the largest single grant in the organization’s 50-year history. Anne oversees development at CRS, including grants, membership, individual giving, the annual fund, planned giving, and special fundraising initiatives such as the 50th Anniversary Fund.

Anne holds a Master of Fine Arts in Creative Writing, a Master of Library and Information Science with a specialization in archives and special collections, and a Bachelor of Arts in Humanities.
Aaron Fountain joined the Cleveland Restoration Society (CRS) staff in 2022 as the African American Cultural Heritage Fellow. This grant funded, year long position was established to further the African American Civil Rights Trail, a major project of CRS.

Aaron’s responsibilities include researching and curating content for the Cleveland Civil Rights Trail website; managing the website launch; coordinating and conducting oral history interviews with elders from the community and editing them for publication to the website, social media, and our partners’ archives; coordinating public events, including Ohio Historical Marker unveiling ceremonies and assisting CRS staff and consulting scholars with other project-related tasks, such as the preparation and submission of Ohio Historical Marker applications.

Aaron holds a MA in History and is currently finishing a PhD in history at Indiana University. His dissertation covers 1960s and 1970s high school student activism in the San Francisco Bay Area. Aaron has written and spoken about the subject in various academic journals and media outlets.
Debra is an accounting and financial professional with over 35 years of experience. As business and accounting manager, Debra is responsible for all financial reporting and budget oversight. She is responsible for processing payroll and employee benefits administration. Debra works with an outside auditor to compile year end audited financial reports.

Debra also manages CRS’s real estate portfolio that now includes 8 historic rental homes and the Sarah Benedict House. Responsibilities include collection of rents, managing service requests, tenant relations and leasing.

Debra joined CRS in September 2017 bringing multi-faceted expertise in financial reporting and accounting. Her experience includes commercial, industrial and multi-family property management.

While employed by the Chartwell Group, Debra managed a real estate portfolio of 1.5 million square feet and managed multiple budgets totaling up to $12 million. She oversaw 45 employees on and offsite for an organization generating $15 million in annual revenue.

Prior to joining CRS, Debra worked for Ozanne Construction Company as the Project Accountant and Labor Compliance Officer. The project was a complete renovation of a public housing building known as Bohn Tower. The property is located on Superior Avenue across from Reserve Square and consists of 22 floors with over 260 rental units. The project cost was $16 million dollars over 28 months. This massive renovation was made possible by a financing package that included HUD, RAD and low-income housing tax credits.
Sohia Jones joined Cleveland Restoration Society as a Membership and Administrative Assistant in January 2022. She works within the Business and Accounting Department and the Development Department, assisting with membership, fundraising, and data reporting. Sohia previously worked with CRS as a Development and Marketing Assistant in 2019, and she brings experience in grant proposal writing and data management from past roles with several Cleveland-area nonprofits.

Sohia received her B.A. in Public and Nonprofit Management from Baldwin Wallace University and is currently pursuing a Master of Urban Planning and Development degree with a specialty in historic preservation at Cleveland State University.
MARGARET LANN
DIRECTOR OF PRESERVATION SERVICES & PUBLICATIONS

Margaret began her career at Cleveland Restoration Society in May 2013 as part of the Heritage Home Program team. Her duties included facilitating the home loan process, providing on-site technical assistance, and advising homeowners on best preservation practices. 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.

In October 2017, Margaret became the Manager of Development and Publications. In this role, she was responsible for managing membership and trustee engagement, facilitating donor stewardship, and managing grants. At this time, Margaret became editor of Facade and all other CRS publications.

In January 2020, Margaret transitioned to Manager of Preservation Services and Publications and, in January 2021, she was promoted to Director. In this role, Margaret provides a range of services to document and preserve historic structures including: building assessments, surveys and historic designation. She also manages special projects, such as the African American Civil Rights Trail, designed to use historic preservation as a community development and place-making tool. Through these community engagement efforts, she is able to diversify the listing of Cleveland area landmarks and historic districts and build a stronger historic preservation constituency in previously under-represented neighborhoods. Margaret continues as editor of Facade magazine and has oversight over other CRS publications.

Margaret remains involved with community outreach and enjoys creating educational workshops, giving presentations, and representing CRS at area events. Margaret is a member of the Cleveland Heights Landmark Commission and adjunct professor at Ursuline College. Margaret holds a Master of Arts in Historic Preservation from Ursuline College.
KATIE LESKOWITZ

DEVELOPMENT & MARKETING ASSOCIATE

Katie Leskowitz joined the Cleveland Restoration Society as a Development and Marketing Assistant in June 2019 and was promoted to an Associate in 2021. She works within the Development department, assisting with event planning, fundraising, and membership. Katie also assists with writing and editing grant proposals, the monthly email newsletter, Perspectives, our semi-annual magazine, Facade, and manages the CRS social media accounts.

Prior to working with CRS, Katie gained preservation experience in her role as an intern for the German Village Society, where she wrote house histories for their residents. Katie was also a museum education intern at the Smithsonian Center for Folklife and Cultural Heritage and helped develop STEM and arts-based activities for the 2017 Folklife Festival. During her undergraduate studies, Katie worked at the Ohio State University Archives, photographing artifacts for their upcoming exhibitions.

Katie is a recent graduate of the Ohio State University, having earned her B.A. in History in May of 2019.
Greg Malenda joined the Cleveland Restoration Society in June 2020 to work on the Dall-Mays houses and shortly after, was promoted to a seasonal Construction Specialist. In December 2020, Greg was promoted to a full-time Construction Specialist. Greg brings over twenty years of hands-on construction expertise to our Heritage Home Program®. Greg 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, Greg owned 2nd Chances Construction & Landscaping. Greg was responsible for managing and supervising all aspects of construction projects.
LAMAR MCCORNEH
HERITAGE HOME PROGRAM℠ ASSISTANT

Lamar McConnell joined the staff as a Heritage Home Program Assistant in 2021. Through his position in the Heritage Home Program℠, Lamar helps homeowners learn about all of the resources that we have to offer owners of older homes. Additionally, Lamar supports the HHP and CRS staff on events and programs.

Lamar is a graduate of Cleveland State University, having earned a B.A. in Black Studies and B.S. in Health Sciences in 2020. Lamar is currently working towards his Ph.D. in African American Studies from Howard University. Lamar is focused on giving back to his community and encouraging youth to achieve their goals.
Jamie Miles joined the Cleveland Restoration Society in September of 2019 as Preservation Programs Assistant, and was promoted to Preservation Programs Associate in 2021. She works with Preservation Services, assisting CRS’ committee work, programming, and services offered to our community partners.

Jamie is a graduate of Case Western Reserve University, having earned her B.A. in Art History, and is currently working on her M.A. in Historic Preservation at Ursuline College. Prior to working for CRS, Jamie was an intern for the City of Cleveland Heights’ Department of Planning and Development. There, she assisted the City’s Historic Preservation Planner in researching historic properties, performing survey work, and staffing the Landmarks Commission. She has also worked for the Museum of Contemporary Art as an Engagement Guide and interned for the Cleveland Museum of Art’s Collections Management Department. Outside of CRS, Jamie enjoys exploring Cleveland by bike and is involved as a volunteer at the Strongsville Historical Society.
STEPHANIE PHELPS
MARKETING & PUBLIC RELATIONS SPECIALIST

Stephanie Phelps joined Cleveland Restoration Society in June 2019. Bringing over twenty year experience in journalism and media, leveraging opportunities for local, regional, and national media coverage is primary to her position. Stephanie 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.

Prior to joining CRS, Ms. Phelps carved out a journalistic and media niche throughout Greater Cleveland. Her achievements cover a wide spectrum across the broadcast, print and digital landscape. As a consummate questioner and one-on-one interviewer, her skills and engaging style have garnered interviews with leading figures including Ranking Member of the U.S. House of Financial Services Committee, The Honorable Maxine Waters; former Ohio Congressman Dennis Kucinich, and U. S. Representative for Ohio’s 11th congressional district, Marcia Fudge. Other notable interviews include film maker Tyler Perry, in addition to noted author and Professor of Sociology at Georgetown University, Dr. Michael Eric Dyson.

Stephanie has also worked as a Public information Officer and in workforce development, with a focus on youth. She holds a BA in Mass Communications and Journalism from Kent State University.
Since November 2011, Thomas A. Jorgensen has been the Chief Operating Officer of the Cleveland Restoration Society. Tom has played an integral role in the growth of the Cleveland Restoration Society for over thirty years, during which time CRS has progressed from being a volunteer-run organization to its current form of twelve professional staff members, a headquarters building, endowment, and programs in the community. His record of trusteeship in terms of dedication, commitment, and strategic focus is unsurpassed. His focus of operations with CRS currently is the Heritage Home ProgramSM, which he has worked to reinvigorate.

Tom had a forty-four-year legal career at the Cleveland firm Calfee, Halter & Griswold LLP, where he led the practice in Employee Benefits and Executive Compensation. His record of leadership in the field is extensive – he has served in numerous roles for the International Bar Association, the American Bar Association, the American College of Employee Benefits Counsel, the International Pension and Employee Benefits Lawyers Association, the US Chamber of Commerce and the Internal Revenue Advisors Group. He has testified to Congress, lectured throughout the world, and has been selected as a leading American lawyer for decades by Chambers USA, Best Lawyers in America, and Ohio's Super Lawyers.
KATHLEEN H. CROWTHER

PRESIDENT

Kathleen H. Crowther has been President of the Cleveland Restoration Society (CRS) since 1987. Under her leadership, CRS has become a nationally recognized historic preservation organization that plays a vital role in resolving challenging preservation issues in the urban, suburban, and outlying regional areas of northeast Ohio. During her tenure, she has led CRS through the acquisition and rehabilitation of the Sarah Benedict House into a regional center for historic preservation and overseen the creation of groundbreaking programs such as the Heritage Home Program℠, the Sacred Landmarks Assistance Program, and African American Cultural Heritage initiatives, including the publication of CRS's first book.

Kathleen is currently an advisor to the National Trust for Historic Preservation representing the State of Ohio. She was elected by her peers as the first local executive director to chair the National Trust's Statewide and Local Partners Program. Kathleen was also selected for the first class of arts leaders by National Arts Strategies to attend a program at Stanford University's Graduate School of Business. She has become involved on an international basis as a participant in the Courants Program of the French-American Foundation (New York, NY), as a Visiting Scholar at the American Academy in Rome, and as a US member of the International Committee structure of ICOMOS (International Commission of Monuments and Sites).

Kathleen has a BA in Art History from Case Western Reserve University and an MS from Cleveland State University's College of Urban Affairs, where she is a part-time Instructor.
The COVID-19 pandemic continued throughout 2021, with variants of the virus dashing hopes for preservation work life returning to “normal.” The “new normal” now includes all staff with laptops and cell phones; working-from-home, going to the office when appropriate; masks for all in-person meetings; internal and external Zoom meetings; and Heritage site visits 3 ways – in-person, phone, video. CRS tested in-person events by reviving “SNOOPS!”, hosting the traditional Community Luncheon (restricted to vaccinated guests) and a hybrid Board of Trustees meeting.

During 2021, CRS staff achieved very significant forward motion on African American heritage, sacred landmarks, the Heritage Home Program SM, and historic property management. These pushes were made possible with the support of a strong financial management approach, an aggressive fund development staff, increases in staffing, and an overall commitment to teamwork as traditional roles periodically change for the good of the whole.

2021 also marked the completion of CRS’s first-ever comprehensive strategic plan. For the first time, the plan was professionally designed and facilitated, and it entailed significant participation from external parties. In recognition of CRS’s long-term staff leadership and its inevitable change in the future, a succession development plan was created. The plan represents a large investment of time and money to create a 5-year framework within which CRS will focus its staff and board resources. It is an ambitious plan that will require significant leadership support from the board and community to realize its vision. Its vision is an expansion of preservation work in every way, and a deepening of engagement with Cleveland’s community while serving more people in need. Yes, it is ambitious.

CRS’s staff is recognized on a local and national level. During 2021, CRS staff presented at the PastForward Conference of the National Trust for Historic Preservation (NTHP), and fulfilled multiple presentation requests from the National Preservation Partners Network (NPPN) and the National Trust for Historic Preservation. CRS leadership served on a national preservation priorities task force examining the intersection of affordable housing, gentrification, density and historic preservation, resulting in an issues brief published by the NPPN and NTHP. The brief is entitled, Affordable Housing and Density, and is available on the NTHP website. CRS continued its engagement with global heritage by hosting several Zoom meetings for the historic cities committee of ICOMOS (International Council of Monuments & Sites).
During 2021, CRS carefully stewarded its limited resources and reached a high-water mark in fundraising. CRS’s attention to financial affairs has been its strength for over three decades. This discipline was comforting given the financial stress many non-profits and for-profit businesses have faced during the pandemic. CRS’s operating reserve fund has been built over many years, and it was a comfort knowing it was there as a rainy day had indeed come. But CRS did not need to use those funds because staff submitted two successful applications to the federal Paycheck Protection Program with a 2021 award (now forgiven) of $173,600, and worked hard on all fronts to hold or increase revenues.

The high-water mark for fund-raising occurred in 2021 when the National Park Service (NPS) awarded Cleveland Restoration Society a $500,000 grant for Cory United Methodist Church, the first site on Cleveland’s African American Civil Rights Trail. This grant is the largest single grant CRS has been awarded during its almost 50-year history. The grant is the culmination of years of work supporting sacred landmarks, a substantial technical report produced by CRS’s Sacred Landmarks Support Initiative and CRS’s Civil Rights Trail project which has wide community support. With the NPS award, CRS’s grants for the year increased 85% over 2020.

During 2021, CRS’s significantly strengthened its financial position. Projections include an increase in the balance sheet of 58% due to the addition of the eight (8) Newton Avenue houses and the Parke residence ($370,000). The operating budget will net positive at $322,546. Overall cash flow is projected to increase by $53,758. Close to $4 million in Heritage escrow funds were managed without incident.

During CDBG year July 1, 2020 to June 30, 2021, the City of Cleveland’s Community Development Department (CD) 100% funded the program only to rescind this without warning into the following CDBG year, July 2021. CRS leadership and Heritage staff mobilized to cover the full amount by year end via a reduced CD allocation and councilmatic support via CDBG and Casino funds. An amazing feat, now in contract stages.

CRS staff strengthened its esprit de corps and teamwork through an estimated 112 staff and department meetings. Staff were involved with convening and supporting 93 meetings with the Board of Trustees, its committees and other formalized external committees.

CRS’s primary tools for community engagement include traditional media (TV, radio and electronic and print news sources), social media (Facebook, CRS’s websites and Instagram), YouTube and LinkedIn.
During 2021, CRS’s noticeable increase in publicity continued with particular media interest related to the African American Civil Rights Trail and the big grant for Cory United Methodist Church. News 5 has an exclusive on the Trail and has developed in-depth reporting. FOX 8 Morning Show has covered the Heritage Home Program℠ and responded to a staff-developed media pitch and story angle for the Trail during Women’s History Month. Other outlets that reported or covered CRS include Cleveland.com, Fresh Water Cleveland, Cool Cleveland, Real Deal Press, Properties Magazine, Scene Magazine and Bike Cleveland. A recorded voice-over/narration was produced in-house and released for the next three Trail sites: The Greater Abyssinia Baptist Church, Olivet Institutional Baptist Church and the Ludlow Community Association.

During 2021, with attention to posting content on CRS-controlled platforms, statistics for social media engagement were up across the board:

- Facebook: 200 posts; 98,494 people reached (saw the content); impressions - 243,000 (number of potential people that could have seen the content through the Facebook network); 16% increase in followers & likes.
- CRS Website: 51,012 page views; 15% increase.
- Instagram: 162 posts; impressions - 56,000; 20% increase in followers.
- LinkedIn: 42 posts; impressions – 8,289; 38% increase in followers.
- YouTube: 12 videos posted; 4,718 views; 91% increase in subscribers.

Staff worked diligently to develop a new CRS-controlled website for Cleveland’s African American Civil Rights Trail. In 2022, this site will be launched with partial content. Based upon the public response to the Trail, we expect this website to reach a huge audience. Stay tuned!

The Heritage staff delivered 45 public education sessions this year, virtual and in-person, personalized to the community and new ones, as requested. The Heritage staff communicated continuously with mayors and elected council representatives, administration officials, and other client city staff via the monthly Field Notes e-newsletter sent to 458 addresses, and quarterly reports, an estimated 16 contacts each year to 40 client cities and 17 Cleveland Council Members for a total of 912 contacts for the year.
Membership and Annual Fund are inter-related, with combined receipts this year only $612 below last year. Attention to membership dues is a monthly endeavor with a surge at year end. In 2021, membership contributions were up 9%, renewals down by 5% and new members up by a whopping 86%. Annual Fund contributions at $149,346 slightly trailed 2020 by $2,173. These still solid results were attained through carefully considered campaigns throughout the year, coordinated with e-mail and e-blast messaging and themes apropos to the moment.

Events, especially CRS’s SNOOPS!, are vital to new member growth. During 2021, CRS offered seven (7) SNOOPS, two of which were virtual and required CRS staff production. The preservation awards program, Celebration of Preservation, completely virtual for the second time, was released on YouTube and Facebook with 247 live attendees, over 900 views and twenty-four (24) sponsors. The event netted $37,250, a 363% increase over last year.

An in-person Community Luncheon, held at Cory United Methodist Church, was a success with 186 tickets sold and an inspiring speaker. Complex logistics were created to check vaccination cards and photo IDs, in such a way to enable limited contact during registration, typically a very congested affair. This was the first time the luncheon was held in a Cleveland neighborhood. By combining the event with the unveiling of the first Civil Rights Trail marker, and a speaker with the possibility of funding Cory’s regeneration, CRS optimized this event with its core preservation priorities. Twenty-two (22) sponsors supported the luncheon.

CRS’s largest single program, the Heritage Home ProgramSM is CRS’s regional calling card, now approaching its 30th Anniversary in 2022. The start of the pandemic rushed the implementation of a self-selecting appointment web process, and the initiation of phone and video appointments. In addition, during 2020, the program was fully funded by the City of Cleveland with all wards included and the mailing of a Mayor’s letter, resulting in over 1,000 responses over a three-week period that required an all-hands-on-deck staff response to handle. These factors, along with others related to the social response to the pandemic, continued a veritable explosion of growth in the program that started in 2020:

Statistics on a 1/1/2021 to 12/31/2021 basis compared to the prior year 1/1/2020 to 12/31/2020 period:

- Inquiries processed: 9,085 (8,867 in prior period)
- Technical assistance provided: 2,702 (2,183 in prior period)
- Site visits: 2,169 (1,559 in prior period)
- Loan applications: 248 (252 in prior period)
- Loans signed: 86 (85 in prior period)
- Value of loans: $3,974,894.25 ($4,042,607.49 in prior period)
The City of Parma, Ohio’s 7th largest and second in size to Cleveland in Cuyahoga County, joined the program in 2021, adding 25,373 eligible households to the list of 40 cities in the program. Berea and Parma Heights rejoined the program in 2021 after not being in the program for a few years.

In order to meet the increased activity of the Heritage program, staffing changes were made which included creation of a new position, program manager, and hiring of additional seasonal staff. Part-time seasonal workers have become part of the program operation with returning workers. Training new staff by already busy program staff created a pressured work environment that was handled with stamina and extra hours and effort. Bravo! Managing the Heritage database in Salesforce is a constant challenge. This year Heritage construction staff used a mobile app in-the-field, significantly increasing turn-around for follow-up materials to be sent to customers. A game-changer.

The Heritage program model is a high-volume system, yet we expect our staff to provide customized service and a personal approach, especially when encountering vulnerable people such as the elderly. Toward this end, staff spent time to add more details to the information we provide to homeowners who need financial assistance, either an outright grant or credit-counseling to become eligible for bank financing. CRS now has a beefy go-to resource to distribute for alternatives to the Heritage program when there is that need. In addition, staff provided extensive assistance to two elderly homeowners with urgent roof problems by working with Cleveland’s Department of Aging and Slavic Village Development to repair or install a new roof before winter.

Staff has worked through unprecedented slow-downs from our lending partners.

**African American Cultural Heritage Programming**

Across CRS’s organizational activities, the goal of telling the full American story is at the forefront. An organization which has been inter-racial from its founding, CRS initiated focused work on African American heritage in 1992 to identify and designate more sites associated with this heritage. During 2021, great strides have been made through CRS’s African American Civil Rights Trail, work with Cory United Methodist Church and East Mt. Zion Baptist Church leading the effort.

**African American Civil Rights Trail:** Great strides were made with the CRS-led African American Civil Rights Trail. The first four (4) sites of the Trail were nominated per the extensive requirements of the Ohio Marker Program and all were approved this calendar year. An additional two markers were funded at $10,000 each, bringing the total of 6 out of 10 markers funded. CRS secured the partnership of the City of Cleveland’s Public Works Department to expertly install the markers, thereby removing untold barriers involving the public right-of-ways, permits and underground utilities, and saving on installation costs.
An additional three (3) Trail sites have been selected and announced to the public. During 2021, CRS received extensive media coverage regarding the Trail from NewsChannel 5, Freshwater Cleveland, Bike Cleveland, and Fox 8. Prior to the fabrication of the first marker, staff spent a great deal of time interviewing eight (8) marketing and web design firms for the branding of the Trail and its corresponding website. Two firms were selected to collaborate and the branding was completed.

The first marker, at Cory UMC was successfully fabricated, shipped and installed in time for its unveiling to occur as part of the Community Luncheon. The custom-branded covering of the marker was unveiled during an emotional ceremony just prior to the luncheon on December 10. Members of the Trail committee were involved and delighted.

**Cory United Methodist Church (UMC):** The National Park Service approved a $500,000 grant to CRS for the exterior masonry envelope stabilization of Cory, CRS’s management of this project, along with nominating it to the National Register of Historic Places. Earlier in the year, CRS’s Sacred Landmarks Support Initiative group produced a Conditions Report on the church which was used as a critical basis for the successful grant proposal. A Request for Proposals for a preservation architect was drafted and released.

In order to spotlight Cory UMC, and because the ballroom would accommodate CRS, the annual Community Luncheon was hosted on site. A farm-to-table luncheon was held immediately after the Civil Rights Trail marker unveiling. A speaker was secured to support the theme of the event, Brent Leggs, Executive Director of the African American Cultural Heritage Action Fund at the National Trust for Historic Preservation. Earlier in the year, an inquiry for funding for the stained glass dome at Cory was declined by the fund. We are hopeful now for a positive response.

**African American Cultural Heritage Fellow:** During 2021, CRS submitted a grant request to the National Endowment for the Humanities to hire an African American Cultural Heritage Fellow to support our work. CRS was successful in its application and was awarded $63,248. A national search yielded 13 qualified applicants who were assessed and interviewed, as appropriate. The selected candidate was elated and has begun work with CRS for a one-year period in January, 2022.

**East Mount Zion Baptist Church:** It was in February, 2020, that CRS became aware that the demolition of this historic Euclid Avenue church was of immediate concern. The pandemic seemed to prevent an April 2020 demolition request to the Cleveland Landmarks Commission. That summer, the new pastor reached out to CRS voicing a desire to preserve rather than to demolish. Staff and volunteers clicked into action to assist the pastor.

The Sacred Landmarks group immediately updated the conditions report produced for the congregation in 2015. At issue is the exterior green serpentine stone which is failing. CRS submitted a successful grant application to Ohio’s Certified Local Government Grant Program for an analysis of the stone ($23,000). The CRS staff developed and issued an RFP/RFQ.
for a team to conduct the analysis. Staff worked with the church committee to create an evaluation tool, to interview project candidates and then hire a team to conduct the stone analysis. The analysis was initiated in 2021 and will be completed in 2022.

CRS staff submitted a successful grant application to the Ohio Development Agency to fund a nomination of the church to the National Register of Historic Places ($4,000). The nomination was researched, written, submitted and approved – with accolades – to the Ohio Historic Preservation Advisory Board. CRS partnered with Cleveland Public Library to digitize the church’s original architectural drawings, thereby adding to the library’s collection and making this material available to the public.

**Black Suburb in the City:** CRS continued to support the Lee-Harvard-Seville neighborhood through promotion of CRS’s book and other related activities. The final chapter and last of three public book discussions took place in early 2021 with urban historian Dr. Todd Michney. The third chapter was brought to life via a YouTube video created and narrated by CRS staff. Subsequently, a public Zoom book discussion was held.

CRS’s engagement with the neighborhood included participation in their well-attended Harvard Community Services Center (HCSC) Resource Fair and the Harvard Healing Jazz Event. CRS continues to stock HCSC and Loganberry Books as they sell the book. Loganberry Books asked for CRS to participate (and we did) at their annual Author Alley event which convenes local authors to sell their books.

<table>
<thead>
<tr>
<th>Sacred Landmarks, Advocacy and Public Policy</th>
</tr>
</thead>
</table>

Providing consultation to Cleveland Sacred Landmarks continued to be an important activity provided to the community by the Sacred Landmarks committee and CRS staff. The committee, composed of experts in the field of ecclesiastical building restoration, were highly active despite the pandemic. Thirty (30) sacred structures were provided technical assistance during 2021. In-person site visits were made to nine (9) sacred sites, and six (6) comprehensive condition and preservation assessments were produced. CRS staff and committee members made a presentation at the Greater Cleveland Faith Cohort. CRS was invited to write an article about the work of the committee to-be-published in the magazine produced by the national organization, Partners for Sacred Places.

Staff has been in consultation with the Cleveland Foundation regarding our steeple-lighting program. During 2021, it was agreed that the final steeple in the program would be fully funded by the foundation. The award recently secured is for $53,535.

Extensive work with other sacred landmarks is described under the section African American Cultural Heritage.

During 2021, CRS staff continued its work to evaluate properties in the “demolition pipeline” of the City of Cleveland’s Building & Housing Department. Started in 2016 as a collaboration, CRS
streamlined the process this year to best respond to reduced funding from Cleveland. Greater emphasis was placed on follow-up for properties that had potential for rehabilitation including mailing Heritage Home Program information to eligible residential property owners. Newly included this year were individual Cleveland Landmarks not located in designated historic districts.

This alliance was the subject of a presentation at the conference of the National Trust for Historic Preservation. Several attendees asked for follow-up information in order to replicate the program in their respective communities.

CRS staff continued to monitor and attend meetings of the Cleveland Landmarks Commission. During past years, it had been the CRS practice to attend each meeting regardless of the agenda. This practice has changed to attending when there is an advocacy matter to be heard, or when the Landmarks staff asks for CRS’s attendance and participation. Staff continued to serve on the local design review committees to share preservation expertise and to enable staff professional development. Historic District and Design Review Committees benefitting from CRS preservation staff expertise are Ohio City, Magnolia-Wade Park, and Franklin-West Clinton.

### Historic Property Ownership and Management

**Newton Avenue Property Donation:** The Board of Trustees decided to accept the donation of eight (8) historic homes on Newton Avenue in late December, 2020. The staff worked with the executor of the estate on transfer of the properties which occurred in March, 2021. CRS management, with support from Trustees, created a separate LLC to hold the properties with supporting bank accounts and insurance. Obtaining insurance on the vacant houses proved to be challenging and required working closely with the insurance company to position the houses to be eligible for coverage. During this period, CRS obtained grants totaling $217,500 related to the development of this project.

CRS has a professional property manager on staff with decades of experience. This has been extremely helpful. Staff spent time to get to know its five (5) new tenants, some of whom have lived in their houses for decades, to allay fears of displacement and huge rent increases. Tenants were transitioned from a month-to-month rent basis to a formal one-year lease agreement without an increase. This happened seamlessly and all rents during 2021 are current. Professional rent rolls were created and an off-hours system put in place.

Staff developed construction specifications for 9804 Newton Avenue. Getting bids proved to be extremely difficult due to an unprecedented construction labor shortage. In addition, costs came in much higher than anticipated by the task force with electrical replacement driving part of the increase. Staff consulted with trustees throughout the process in order to carefully make the best decisions about moving forward. Shortly, 9804 Newton will be completed and ready for occupancy. During 2021, limited demolition for new electrical at 10003 Newton was completed. All vacant houses were professionally maintained for landscaping.
A major factor which influenced the plans for Newton Avenue was the requirement of lead safety for all rental houses. CRS staff invested a great deal of time to ascertain the legal requirements of the Cleveland Lead Safe Certification program. Three staff members are now qualified for assessing houses for lead and for lead safety. During 2021, CRS began the process of evaluating all of its rental houses for lead in order to be obtain proper certification. One house (9800 Newton), occupied by children, poses serious lead hazards. CRS arranged to temporarily move the occupants to the completed 9804 Newton Avenue during a process to remove the lead hazards at 9800.

**Parke Residence donation:** Long-time members and supporters, Jude and Dick Parke, informed CRS during 2021 of their desire to donate their beloved home, the historic Jacob Strong home in Shaker Heights, to CRS. The donation includes an adjacent garden. The Parke residence is one of the oldest extant homes in Shaker Heights, thought to have been constructed in 1839, perhaps earlier. It has a colorful history associated with Shaker Heights, John D. Rockefeller, and a gun battle between the underworld and Shaker law enforcement in 1921. The house and garden are in excellent, even superior condition.

The donation of property was evaluated and approved by the Board of Trustees in October, 2021. Staff developed the agreement with the property owners which includes a sale after CRS takes title. Staff worked in consultation with Trustees on the details of the donation to optimize the value of the donation and to select the best qualified appraiser. Developing the appraisal took time given the unique nature of the donation. By the close of 2021, CRS became the owner of the two properties with an appraised value of $370,000.

**Dall-Mays Houses:** The Dall-Mays Task Force continued to meet monthly throughout 2021, accomplishing a number of projects. Most importantly, new roof and gutter systems were installed on both houses, a huge step towards the stabilization of the properties. Two SNOOP tours were held, the first being a virtual tour in March and the second in-person tour was held in August with Covid protocols in place. For each tour, every resident on the street was issued a letter of invitation, furthering CRS’ engagement in the neighborhood. Residents attended both the virtual and in-person event. Partnership with the local community development corporation was increased, and a new relationship was forged with the City Planner for the Central neighborhood. These new partnerships have helped to further the redevelopment conversation with potential partners.

<table>
<thead>
<tr>
<th>Small Deals</th>
</tr>
</thead>
</table>

During 2021, CRS diligently managed its second Small Deals investment in the Bristol Apartments, now in its final phase. CRS managed the third and largest investment payment to the project in the amount of $180,080 from the investor predicated on the issuance of the Certificate of Occupancy, approval of Part 3 by the National Park Service, and favorable
comments of several Trustees after a walk-through. CRS anticipates the final investment payment in 2022.

During 2021, CRS staff has been pulled into serious issues with the second project related to cash flow difficulties and inadvisable demands from the Department of Community Development (CD). Still in play is that CD is advocating for removal of restored historic windows which would cause the loss of the federal tax credits. Such a loss would flow through to the tax credit investor and would ruin CRS’s relationship with the direct investor. In order to prevent this, CRS has had to become an advocate for the project at City Hall.

The Small Deals Program continues to be negatively affected by the pandemic because the community development corporations remain focused on delivering emergency services to their constituents. An effort to engage Trustees with outreach to CDCs did not gel. Changes to the federal historic tax credit program which converted the tax credit to a five (5) year credit rather than a one (1) year credit will reduce potential investors. CRS management will recommend that this initiative be re-characterized as a CRS capability rather than a Program.