

2022 annual report



**USS CLEVELAND  
LEGACY FOUNDATION**



My Fellow Clevelanders:

I am pleased to present this third annual report of the USS Cleveland Legacy Foundation (USSCLF), a nonprofit organization whose vision is to support positive civil-military relations by creating and maintaining a strong, meaningful, and direct bond between citizens of northeast Ohio and the crew of USS *Cleveland* (LCS 31).

Though anticipated to have been a quieter year between our ship's keel laying in 2021 and christening earlier this year, 2022 proved to be a very active time for the Foundation. Among other activities, the USSCLF hosted two sister Freedom-class Littoral Combat Ships for port visits to Cleveland in the spring and autumn; took the first cohort of *STEAM Stars* students to the shipyard in Marinette, Wisconsin to witness the ongoing construction of the future USS *Cleveland*; visited the newly formed crew of *Cleveland* in Jacksonville, Florida for the first time; and presented the inaugural Cleveland Navy Ball at The Union Club to celebrate the U.S. Navy's 247th birthday. Information on these events and other activities is featured in this report.

The Foundation also continued its efforts on *Launching a Legacy*, our inaugural campaign to raise \$5,000,000.31 to support ongoing operations leading to the ship's commissioning (now projected for spring 2025) and prepare for the future with the establishment of an endowment fund at The Cleveland Foundation. We are incredibly grateful to all of our generous donors – corporations, foundations, and individual philanthropists – for their early investments in this special civic initiative. As usual, the Greater Cleveland community is coming together around a cause larger than self, resulting in the Foundation already raising two-thirds of its campaign goal.

On behalf of our entire team, I express my sincere appreciation for the steadfast support you are providing as we do what no city has done before. Our mutual efforts are building strong and lasting ties between the people of Cleveland and the crew of the future USS *Cleveland*. We're eager to continue this journey with you.

A handwritten signature in black ink that reads "M. D. Dovilla".

MICHAEL D. DOVILLA  
Chief Executive Officer

# PURPOSE STATEMENTS

## ***Our Vision***

To support positive civil-military relations by creating and maintaining a strong, meaningful, and direct bond between citizens of northeast Ohio and the crew of USS *Cleveland* (LCS 31).



## ***Our Mission***

To send USS *Cleveland* (LCS 31) to the Fleet with the greatest start possible, to support the ship and crew throughout her service life, and to welcome her home to Cleveland at the completion of her Naval service.





## ORGANIZATIONAL ASSESSMENT

For the third consecutive year, the Foundation conducted an organizational assessment for stakeholders to evaluate progress and offer recommendations. Overall, the responses indicated a young organization that continued to evolve in a healthy direction. The survey identified the following themes for the Foundation to consider in 2023:

- ✧ Maintain our mission focus and efficient operations with use of OKRs;
- ✧ Achieve clarity and alignment regarding the move toward public engagement and the public phase of fundraising;
- ✧ Continue (and increase) focus on fundraising overall;
- ✧ Resist engaging in items that are beyond our mission scope;
- ✧ Re-energize our team with enthusiasm and engagement; and
- ✧ Maintain high standards and thoughtful planning.

## SIGNIFICANT ACTIONS

During the third full year of the Foundation's history, the Board of Directors continued to demonstrate flexibility in meeting the dynamic requirements of a growing organization. Key actions in 2022 included:

- ✧ Establishing standing committees on Volunteers, Heritage, and Sailor Support;
- ✧ Issuing a request for proposals, vetting, and selecting a new partner financial institution;
- ✧ Establishing the USS Cleveland Legacy Foundation Fund at The Cleveland Foundation;
- ✧ Updating the Foundation's Code of Regulations, making revisions to some leadership titles to align with nonprofit best practices;
- ✧ Electing a slate of officers for the period 2022-2025, which is designed to offer steady leadership for the Foundation through commissioning and provide new leaders an opportunity to step up for Phase II (Service Life Support); and
- ✧ Electing two new Directors, Mr. Chris Garazatua and Ms. Melissa Lias, and a new Honorary Director, Major General Robert Stall, U.S. Army (Ret.).

## OBJECTIVES AND KEY RESULTS (OKRs)

At its annual strategic planning retreat in April 2022, the Foundation expanded and reorganized its OKRs into six major lines of effort:

- 🌀 **Development:** Maintain and build fundraising momentum and long-term financial plan
- 🌀 **Education:** Educate targeted populations through curricula, events, and programs
- 🌀 **Community Engagement:** Engage the community through marketing, events, and programs
- 🌀 **Crew Support:** Build necessary structure and relationships for supporting USS *Cleveland*'s crew
- 🌀 **Organizational Development & USSCLF Workforce:** Develop and systematically improve the USSCLF organization
- 🌀 **Commissioning:** Plan and execute a world-class Commissioning Week for USS *Cleveland*

### PHASE I KEY RESULTS

**KR 1:** Raise \$5,000,000.31

**KR 2:** Establish meaningful contact with 100 percent of crew members and ensure Adopt-a-Sailor program is ready to launch

**KR 3:** Attract 20,000 attendees to Commissioning



## EVENTS

The Foundation maintained a busy schedule of events throughout 2022, including the following:

### **Cleveland Cavaliers Suite – March**

As part of their in-kind support to the Foundation, the Cleveland Cavaliers hosted donors, friends, and directors in a suite for an exciting game versus Minnesota. We appreciate all of our corporate, foundation, and individual donors, whose generous support is advancing the Foundation toward its \$5,000,000.31 goal in the *Launching a Legacy* campaign.

### **Annual Strategic Planning Retreat – April**

The Board of Directors hit the road for its annual retreat, visiting the Buffalo and Erie County Naval & Military Park to learn more about a successful museum that features retired U.S. Navy ships. Phase III of the USSCLF's mission envisions returning the future USS *Cleveland* (LCS 31) to the shores of Lake Erie as a museum and memorial.

### **STEAM Stars Inaugural Cohort Trip to Marinette – April**

In recognition of their participation as the inaugural cohort of the *STEAM Stars* educational program, the Foundation took a group of Wade Park School scholars to Fincantieri Marinette Marine (FMM) in Marinette, Wisconsin. The students learned about STEM careers, received valuable mentoring from FMM executives, and became some of the first Clevelanders see the completed hull of the future USS *Cleveland* (LCS 31). We're grateful to our partners and supporters who made this trip possible, including Arborwear, Cleveland Metropolitan School District, FirstEnergy Foundation, Parker Hannifin, and Ultimate Air Shuttle.

### **Cleveland Port Visit of USS *Minneapolis-Saint Paul* (LCS 21) – May**

Over Memorial Day weekend, the USSCLF welcomed USS *Minneapolis-Saint Paul* (LCS 21), one of our Freedom-class sister ships, to Cleveland for their first port visit after commissioning in Duluth, Minnesota. Our Foundation team coordinated a variety of hospitality opportunities for the crew, including a cookout with the Cleveland Police Patrolmen's Association and a Cleveland Guardians game. While visiting, the command also generously offered ship tours to our partners and friends.

### **Greater Cleveland Attorneys Reception – June**

We enjoyed seeing so many friends from Cleveland's legal community at a reception and program on the role of the military judge advocate. Thanks to Bashein & Bashein Co., LPA for sponsoring the event, Great Lakes Science Center for hosting, and our Honorary Directors, Janet Donovan and Peter Collins, for offering their perspectives on legal careers in the U.S. Navy and U.S. Marine Corps and why they are involved with the Foundation.

### **Steak Club Foundation Golf Outing Benefiting USSCLF – June**

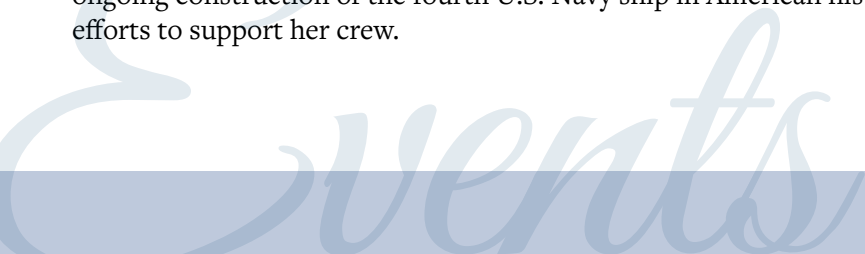
The Steak Club Foundation generously designated the USSCLF as the beneficiary of its 5th Annual Charity Golf Classic. The event attracted a sell-out crowd for the first time in its history and all proceeds supported the USS *Cleveland* effort!

### **Cleveland Lone Sailor Monument Site Reveal Breakfast – July**

The Foundation unveiled plans for the Lone Sailor Monument at Voinovich Bicentennial Park. We were joined by representatives from the Voinovich family, Cleveland Metropolitan School District, and Ohio CAT, along with many of our donors and partners. Plans remain underway for the final siting of this historic monument honoring members of America's Sea Services from Greater Cleveland.

### **Cleveland Tall Ships Festival – July**

The Foundation team enjoyed participating in Cleveland Tall Ships Festival. In addition to volunteers and staff hosting a booth featuring information and displays and selling some of the first USSCLF swag, CEO Mike Dovilla shared news on the ongoing construction of the fourth U.S. Navy ship in American history to bear the name "Cleveland" and the Foundation's efforts to support her crew.







Annual Strategic Planning Retreat



Cleveland Cavaliers Suite



Steak Club Foundation Golf Outing Benefit



Cleveland Tall Ships Festival



STEAM Stars Inaugural Cohort Trip to Marinette



Greater Cleveland Attorneys Reception



Cleveland Port Visit by MSP (LCS 21)



Cleveland Lone Sailor Monument Reveal



## Medical Community Mixer – September

Cleveland Clinic and University Hospitals joined the USSCLF in hosting a breakfast reception highlighting the important contributions of Navy Medicine to the Fleet.

## Cleveland National Air Show – September

The USSCLF team joined with the Cleveland Browns, Logicalis, Parker Hannifin, Pierre’s Ice Cream Company, Platform Beer Company, and USS *Cod* Submarine Memorial to welcome the Blue Angels, the U.S. Navy’s flight demonstration squadron, to town for their popular biennial air show.

## Inaugural Cleveland Navy Ball – October

The Foundation led our community’s celebration of the 247th anniversary of the U.S. Navy’s founding with the Cleveland Navy Ball. This first-time event, which sold out the ballroom of The Union Club of Cleveland, raised over \$130,000 for the Foundation. It is envisioned as an annual signature USSCLF function.

## Cleveland Port Visit of PCU *Cooperstown* (LCS 23) – October

The USSCLF welcomed its second sister ship to town in the fall, as the future USS *Cooperstown* made a port call. The multi-day visit included an awards ceremony, stadium tours, and pier side cookouts with support from the Bob Feller Act of Valor Foundation, Cleveland Browns, Cleveland Guardians, Cleveland Police Patrolmen’s Association, Platform Beer Company, and Steak Club Foundation.

## Board Meeting in Gettysburg – November

Director Craig Bashein, who also serves as chairman of the Gettysburg Foundation, generously invited the USSCLF Board of Directors to hold its final meeting of 2022 at the battlefield in conjunction with Gettysburg’s annual gala. Our team enjoyed the camaraderie of a second offsite gathering and the opportunity to learn best practices from another nonprofit organization dedicated to a patriotic cause.

## Initial Visits to *Cleveland* Crew in Jacksonville – November & December

The USSCLF team paid a pair of visits to the newly formed crew of the future USS *Cleveland* at their homeport of Mayport Naval Station in Jacksonville, Florida. Our volunteers and staff delivered gifts and enjoyed some fellowship with the Sailors.

## Ship Model Presentations – Throughout the Year

The Foundation presented scale models of the future USS *Cleveland* (LCS 31) to our generous Admiral and Captain level sponsors, including:

- 🚢 **Ohio CAT**
- 🚢 **Cleveland Cliffs**
- 🚢 **Lincoln Electric**
- 🚢 **TransDigm**

## Community Outreach – Throughout the Year

Throughout 2022, the Foundation ramped up its community outreach by speaking to various civic and veterans organizations around our region, including:

- 🚢 **Lakewood-Rocky River Rotary Club**
- 🚢 **Cleveland Rotary Club**
- 🚢 **Rotary Club of Shaker Heights**
- 🚢 **U.S. Naval Academy Alumni Association – Cleveland & Northeast Ohio Chapter**
- 🚢 **Rotary Club of Strongsville**
- 🚢 **Chagrin Valley Rotary Club**







Medical Community Mixer



Cleveland National Air Show Veterans Cookout with Parker Hannifin



Blue Angels Leadership Breakfast during Cleveland National Air Show



Gettysburg Battlefield Tour during Board Meeting



Cleveland Port Visit by PCU  
*Cooperstown* (LCS 23)



Inaugural Cleveland Navy Ball



Initial Visit with Cleveland Crew in JAX



Ship Model Presentations



## PARTNERS

At the end of 2022, the Foundation's generous partners helped raise \$3.3 million, or two-thirds of the *Launching a Legacy* campaign's goal. Among the Plank Owners – USSCLF's charter supporters – are the following leaders:

### PLANK OWNERS LEADERBOARD

Admiral: **\$500,000.31**

**Ohio**



Captain: **\$300,000.31**



Commander: **\$150,000.31**



**USS CLEVELAND  
LEGACY FOUNDATION**

# ADDITIONAL PLANK OWNERS

Master Chief: **\$75,000.31**

CONNOR  
FOUNDATION

Swagelok

CALFEE



Bashein  
& Bashein  
COMPANY, L.P.A.



**The Levanduski Family**  
*Joe, Cheryl, Matt, and Emily*

**The William & Pam Summers Family**  
*In memory of CDR Robert "Tuck" Brant, USN*

Senior Chief: **\$50,000.31**



Kevin Stein



Chief Petty Officer: **\$25,000.31**

**Robbins Foundation**

*In honor of Chief Tyler and Marla Robbins*

Maia Hansen

William Litzer



Commodore Perry's Companions: **\$10,000.31**



Stephanie Altenburger

**The Prather Family**

*Keven & Cathy Prather  
Billy V. Prather*

Feller's Fans: **\$5,000.31**



FIFTH THIRD BANK



**The Benjamin & Lindsay Baran Family**

John M. Deur, Ph.D.

Hon. Michael D. Dovilla

**The Folk Family**

*In loving memory of  
LT Frank A Folk, MD, USNR MC*

**Michael J. Horvitz**

**The Mihalik-Potoczak Family**

**The Previts Family**

Ginni D. Ragan

David W. Steffee

Crowder's Corpsmen: **\$2,500.31**

Kathi Chapman  
Adel Cooper  
Richard J. DeCarlo

Steven J. Demetriou  
Richard Gamble  
Kevin Murrow

LaRese B. Purnell  
Daniel Raymond



Pat Rios  
VFW Post 3345





# FINANCIALS

## Statement of Financial Position

As of December 31, 2022

Total

### ASSETS

#### Current Assets

##### Bank Accounts

Checking	15,000.00
Non - Profit Checking (3752)	912,905.78

**Total Bank Accounts 927,905.78**

##### Accounts Receivable

Accounts Receivable	2,730.19
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**Total Accounts Receivable 2,730.19**

#### Total Current Assets

**930,635.97**

#### Fixed Assets

Equipment	274,795.29
Accumulated Depreciation	-54,959.06

**Total Equipment 219,836.23**

#### Total Fixed Assets

**219,836.23**

#### Other Assets

Cleveland Fdn - USS Cleveland Legacy Fund	100,000.00
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**Total Other Assets 100,000.00**

### TOTAL ASSETS

**\$1,250,472.20**

### LIABILITIES AND EQUITY

#### Liabilities

#### Total Liabilities

#### Equity

Net Assets	860,852.92
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Net Revenue	389,619.28
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**Total Equity 1,250,472.20**

### TOTAL LIABILITIES AND EQUITY

**1,250,472.20**

## BOARD OF DIRECTORS – 2022

**Mrs. Robyn P. Modly**  
*Ship Sponsor*

### DIRECTORS

**James M. Folk**  
*Chair*

**Keven P. Prather**  
*Vice Chair*

**Karen Mihalik Potoczak, M.D.**  
*Secretary*

**LaRese B. Purnell**  
*Treasurer*

**Hon. Michael D. Dovilla**  
*Chief Executive Officer*

**Benjamin E. Baran, Ph.D.**

**W. Craig Bashein**

**Richard J. DeCarlo**

**Maia Hansen**

**Doug Harvey**

**Jeremy M. Komasz**

**Melissa A. Lias**

**Matthew J. Previts**

**Rear Adm. Dwight D. Shepherd, USN (Ret.)**

**Capt. Colleen Gallagher Thomas, NC, USN (Ret.)**

### HONORARY DIRECTORS

Vice Adm. C. Forrest Faison,  
MC, USN (Ret.), M.D.

Vice Adm. Bruce E. Grooms, USN (Ret.)

Rear Adm. Julius S. Caesar, USN (Ret.)

Rear Adm. Janet R. Donovan, USN (Ret.)

Rear Adm. Michael N. Parks, USCG (Ret.)

Rear Adm. Duret S. Smith,  
MC, USN (Ret.), M.D.

Maj. Gen. Robert Stall, USA (Ret.)

Brig. Gen. Peter B. Collins, USMC (Ret.)

Mr. Christopher M. Connors

Mr. William B. Summers, Jr.

Mr. Emory C. Crowder, Jr. \*

\* Deceased



## PROFESSIONAL STAFF

**Michael D. Dovilla**

*Chief Executive Officer*

**Courtney Smrdel**

*Director of Operations*

## STANDING COMMITTEES – 2022

### Executive

Jim Folk, Chair  
Ben Baran, Director  
Karen Mihalik Potoczak, Director  
Keven Prather, Director  
Matt Previts, Director  
LaRese Purnell, Director  
Mike Dovilla, Director (non-voting)

### Audit

Richard DeCarlo, Chair  
Jeremy Komasz, Director  
Karen Mihalik Potoczak, Director

### Development

Matt Previts, Chair  
Craig Bashein, Director  
Doug Harvey, Director  
Jeremy Komasz, Director  
Karen Mihalik Potoczak, Director

### Events

Karen Mihalik Potoczak, Chair  
Richard DeCarlo, Director  
Matt Previts, Director

### Finance

LaRese Purnell, Chair  
Keven Prather, Director

### Governance & Nominations

Ben Baran, Chair  
Keven Prather, Director  
Karen Mihalik Potoczak, Director  
Jackie Vary, Volunteer

### Heritage

Tim Daley, Chair  
Craig Bashein, Director

### Marketing

Melissa Lias, Chair  
Keven Prather, Director  
LaRese Purnell, Director  
Colleen Gallagher Thomas, Director

### Personnel & Compensation

Ben Baran, Chair  
Richard DeCarlo, Director  
Doug Harvey, Director  
Karen Mihalik Potoczak, Director

### Volunteers

Chris Garazatua, Chair  
Ben Baran, Director  
Jeremy Komasz, Director

*N.B.: Ship Sponsor Modly, Board Chair Folk, CEO Dovilla, and Director of Operations Smrdel are ex officio to all standing committees.*







## USS CLEVELAND LEGACY FOUNDATION

1001 Lakeside Avenue East, Suite 1520  
Cleveland, Ohio 44114

[usscleveland.org](http://usscleveland.org)

The USS Cleveland Legacy Foundation is a nonprofit 501(c)(3) public charity as determined by the Internal Revenue Service. The mission of the Foundation is to send USS *Cleveland* to the Fleet with the greatest start possible, to support the ship and crew throughout her service life, and to welcome her home to Cleveland at the completion of her Naval service. Our nonprofit identification number is 83-4007897.