

2023 annual report



**USS CLEVELAND  
LEGACY FOUNDATION**

May 10, 2024



My Fellow Clevelanders:

I am pleased to present this annual report of the USS Cleveland Legacy Foundation (USSCLF). The Foundation's 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) – the fourth U.S. Navy warship named in honor of the City of Cleveland.

Although our ship's construction timeline has experienced repeated extensions, the Foundation has taken advantage of the additional time to cultivate key relationships, build operating and endowment funds, and plan for the future. Together, we have continued to expand public awareness throughout Greater Cleveland, engage meaningfully with the ship's crew in Jacksonville, and prepare for an exceptional celebration when the future USS Cleveland is commissioned in her namesake city. That highly anticipated weeklong series of events is now tentatively scheduled for summer 2025.

The USSCLF maintained an active programming calendar throughout 2023, hosting the now customary port visit of another sister littoral combat ship, coordinating the first Navy Week in our city since 2018, and presenting the Cleveland Navy Ball to celebrate the U.S. Navy's 248th birthday. The most noteworthy event of the year, however, was the christening and launch of the future USS Cleveland, a milestone in the life and legacy of any ship.

The Foundation also surpassed the 80 percent mark of Launching a Legacy, our inaugural campaign to raise \$5,000,000.31 to support ongoing operations leading to the ship's commissioning and to prepare for the subsequent phases of service life support and establishment of a museum ship. We remain deeply grateful to our generous supporters for their investment in this project.

In preparing this year's report, I note that the time has come to pass the guidon to a new leader as I pursue another opportunity to serve our community. It was a highlight of my career to co-found and lead the Foundation from inception to a thriving nonprofit. After five years at the helm, I am pleased to transition a financially secure, philanthropically embraced, and operationally sound organization to its next leader, Brigadier General Pete Collins, USMC (Ret).

I have every confidence that with Pete and Courtney's steady leadership, the Board's responsible oversight, and the community's abiding support, the USS Cleveland Legacy Foundation will continue carrying out its vision and executing its mission on a truly remarkable civic initiative. It has been my sincere joy to lead this fine organization. Go Navy!

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

MICHAEL D. DOVILLA

Chief Executive Officer (2019-2024)

# 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

The Foundation once again 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 2024:

- ✧ Maintain our mission focus and efficient operations with use of OKRs;
- ✧ Renew or strengthen focus on community engagement and connection with Cleveland;
- ✧ Continue (and increase) focus on fundraising overall;
- ✧ Employ and engage our staff and volunteers wisely to share workload;
- ✧ Thoughtfully plan for the future with regard to board member's involvement; and
- ✧ Continue to build connection with the crew.

## SIGNIFICANT ACTIONS

During the past year the Foundation's Board of Directors continued to exhibit flexibility and innovation in meeting the dynamic requirements of a growing organization. Key actions in 2023 included:

- ✧ Conducting a productive annual strategic planning retreat and facilitating an initial visit for Board members to meet the ship's crew on Naval Station Mayport;
- ✧ Refining financial processes by adopting a Finance Committee charter, strengthening linkages between fund development, accounting, and budgeting, and leveraging the resources of a newly selected partner financial institution;
- ✧ Establishing an Audit Committee, adopting a committee charter, and engaging in all necessary preparatory activities to conduct the Foundation's first audit;
- ✧ Electing two new Directors, Brigadier General Peter Collins, U.S. Marine Corps (Ret.) and Ms. Annie Schwarz;
- ✧ Restructuring standing committees to improve alignment of development and marketing;
- ✧ Leveraging the Sailor Support Committee to build key components of Phase II (Service Life Support), including the *Adopt-A-Sailor* Program and *Land in the Land* Career Transition Program;
- ✧ Hosting crew members of the future USS *Cleveland* (LCS 31) for the initial visit to their namesake city during the first Navy Week to occur in Cleveland in five years;
- ✧ Strengthening a vital relationship between the Heritage Committee and the LPD 7 Veterans Organization by accepting custody of a substantial amount of archival material from the former USS *Cleveland* (LPD 7) envisioned to be featured in Phase III (Museum Ship); and
- ✧ Advancing significantly planning for approval, construction, installation, and dedication of the Cleveland Lone Sailor Monument in the summer of 2024.

## OBJECTIVES AND KEY RESULTS (OKRs)

At its annual strategic planning retreat in March 2023, the Foundation validated its 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 2023, including the following:

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

As part of their in-kind support to the Foundation, the Cleveland Cavaliers hosted donors, friends, and Board members in a Rocket Mortgage FieldHouse suite for a convincing victory over the Washington Wizards. 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 – March***

The Board of Directors hit the road once again for its annual retreat, this time traveling to Jacksonville, Florida. In addition to conducting a productive annual meeting and planning session, Foundation leaders had the opportunity while on board Naval Station Mayport to visit crew members assigned to the future USS *Cleveland* (LCS 31) for the first time at their homeport and tour USS *Winston Churchill* (DDG 81).

### ***Christening and Launch of Cleveland – 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 to 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.

### ***Navy Week Cleveland – September***

The USSCLF team hosted the Director of the Navy Staff, Flag Officers, and Sailors from the future USS *Cleveland* (LCS 31) for the first Navy Week in Cleveland, Ohio since 2018. The series of events during the first week in September included opportunities for the crew to volunteer with Cleveland nonprofits, tour our city's world class institutions, and interact with members of our leadership team as we look ahead to many years of support for these Sailors and their successors during Phase II (Service Life Support).



*Christening and launch of the future USS Cleveland*





*Above: Navy Week - Cuyahoga County Office of Emergency Management personnel took PCU Cleveland sailors on a tour of the waterways via fire boat.*



*Above: Annual Strategic Planning Retreat at Naval Station Mayport*



*Navy Week - PCU Cleveland sailors volunteer at the Greater Cleveland Food Bank.*



*Volunteers meet at Great Lakes Science Center.*



## ***Cleveland Navy Ball – October***

The Foundation led our community's celebration of the 248th anniversary of the U.S. Navy's founding with the Cleveland Navy Ball. For the second time in as many years, the event sold out the ballroom of The Union Club of Cleveland. The Ball exceeded all metrics established at the previous year's inaugural gathering, with net proceeds of more than \$170,000, including \$96,000 generated for the USSCLF's Sailor Support Fund, established in 2022. In its first two years, Greater Cleveland's generous donors have provided nearly \$300,000 in net support for the Foundation at the Navy Ball.

## ***Cleveland Port Visit of USS Marinette (LCS 25) – October***

USSCLF welcomed another sister ship to town, the only such visit in 2023, as USS Marinette (LCS 25) made a port call. The multi-day visit included our customary hospitality, such as pier side cookouts and facilitation of tours across Cleveland.

## ***Community Outreach – Throughout the Year***

Throughout 2023, the Foundation continued its community outreach by speaking to various civic, professional, and veterans organizations around our region, including:

🚢 ***American Legion Post 336***

🚢 ***Aurora Rotary Club***

🚢 ***Friends of Solon Library***

🚢 ***Greater Cleveland Chapter, Military Officers Association of America***

🚢 ***Kirtland Veterans Prayer Group***

🚢 ***Last Stop Willoughby***

🚢 ***NEOTAN Business Professionals Networking Group***

🚢 ***Ohio Bar Association***



*Heritage Committee Chair, Tim Daley presents to the Friends of Solon Library*



*Volunteer Steve Tomaselli and Tim Daley at Last Stop Willoughby*





*Above: Cleveland Port Visit of USS Marinette*



*Navy Ball - The oldest and youngest sailor in the room.*



*Navy Ball - Cleveland Sea Cadets on their way to Present the Colors at the Union Club*

## PARTNERS

By the end of 2023, the Foundation's generous partners helped raise \$4.1 million, or more than four-fifths 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

Bashein  
& Bashein  
COMPANY, L.P.A.



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

Swagelok

**Kevin & Kristen Stein**

CALFEE



hij **BRENNAN**

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

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

fathom

Pierre's

EATON

**William Litzler**

RPM

**Robbins Foundation**  
*In honor of  
Chief Tyler and Marla Robbins*

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

Maia Hansen



WESTFIELD®

NORTHEAST OHIO  
FOUNDATION for  
Patriotism



SHERWIN  
WILLIAMS.

Anonymous Donor

Cleveland  
Clinic

DiGERONIMO  
COMPANIES

UNION CLUB  
OF CLEVELAND

MAI  
CAPITAL MANAGEMENT

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

Stephanie Altenburger

The Mihalik-Potoczak  
Family

The Previts Family

GOODYEAR.  
MORE DRIVEN

The Benjamin & Lindsay  
Baran Family

The Modly Family

CLEVELAND  
Foundation

The Steak Club  
Foundation

The Folk Family

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

The Prather Family

*Keven & Cathy Prather  
Billy V. Prather*

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



FIFTH THIRD BANK



VFW 3345  
Empowering Veterans while  
Strengthening Community

Richard Bashein  
Richard J. DeCarlo  
John M. Deur, Ph.D.  
Hon. Michael D. Dovilla  
Alex and Arabella Feil  
The Garazatua Family

Michael J. Horvitz  
Jeremy Komasz  
Ginni D. Ragan  
Dwight Shepherd  
David W. Steffee

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

Kathi Chapman

The Fuss Family  
Colleen Gallagher-Thomas

The Maloof Family  
Kevin Murrow  
LaRese B. Purnell  
Daniel Raymond  
Pat Rios  
Mary Warner

FirstEnergy  
Foundation

Jon Karlamia  
FINE ART

Pete Collins

Richard Gamble

BAE SYSTEMS  
INSPIRED WORK

Adel Cooper

Andrew Guenther

Steven J. Demetriou

# FINANCIALS

## Statement of Financial Position

As of December 31, 2022

Total

### ASSETS

#### Current Assets

##### Bank Accounts

Checking	249,121.11
Non - Profit Checking (3752)	1,300,064.21

**Total Bank Accounts** **1,549,185.32**

##### Accounts Receivable

Accounts Receivable	275,763.69
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**Total Accounts Receivable** **275,763.69**

#### Total Current Assets

**1,824,949.01**

#### Fixed Assets

Equipment	252,245.29
Accumulated Depreciation	-109,918.12

**Total Equipment** **142,327.17**

#### Total Fixed Assets

**142,327.17**

#### Other Assets

Cleveland Fdn - USS Cleveland Legacy Fund	101,103.09
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**Total Other Assets** **101,103.09**

### TOTAL ASSETS

**\$2,068,379.27**

### LIABILITIES AND EQUITY

#### Liabilities

#### Total Liabilities

#### Equity

Net Assets	1,683,866.07
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Net Revenue	536,109.60
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#### Total Equity

**2,067,632.09**

### TOTAL LIABILITIES AND EQUITY

**\$2,068,379.27**



## BOARD OF DIRECTORS – 2023

**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**

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

**Richard J. DeCarlo**

**Chris Garazatua**

**Maia Hansen**

**Jeremy M. Komasz**

**Annie Schwarz**

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

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

### HONORARY DIRECTORS

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

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

Mr. Christopher M. Connors

Mr. Matthew J. Previts

Mr. Emory C. Crowder, Jr. \*

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

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

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

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

Mr. William B. Summers, Jr.

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

\* Deceased

## PROFESSIONAL STAFF

### **Michael D. Dovilla**

*Chief Executive Officer*

### **Courtney Smrdel**

*Director of Operations*

## STANDING COMMITTEES – 2023

### **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 & Marketing**

Annie Schwartz, Chair  
Craig Bashein, Director  
Pete Collins, Director  
Collen Gallagher Thomas, Director  
Jeremy Komasz, Director  
Karen Mihalik Potoczak, Director  
Keven Prather, Director  
Matt Previts, 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

### **Sailor Support**

Jeremy Komasz, Director

### **Personnel & Compensation**

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

### **Volunteers**

Chris Garazatua, Chair  
Ben Baran, Director  
Mike Parks, Honorary 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.