

# Philanthropy Review

FALL  
2024

## President's Pen

Interim President & CEO Claudia Y.W. Herrold reflects on the past and present in order to inform the way forward in her President's Pen column as Philanthropy Ohio's interim CEO.

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## Exploring how to make democracy bigger than politics

Foundation experts on democracy building who will present at Philanthropy Forward '24 share how democracy fits into the broader context of philanthropy and what they hope funders will take away from their session, even if you're not a "democracy funder."

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## Ask the Expert

Fund Evaluation Group highlights the success of three key stocks, Nvidia, Microsoft and Apple, earning them a new in-house moniker, the "Ten Trillion Dollar Trio," in its market commentary synopsis.

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## Philanthropy Forward '24 plenary presenters

Meet all the leaders headlining the September 23 – 25 conference in Cincinnati.

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## Plus!

We caught up with Keith Burwell before he retired as president of the Greater Toledo Community Foundation.

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## STAFF & BOARD OF TRUSTEES

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Timothy Tramble, Saint Luke's Foundation

Stephen Williams, Morgan Family  
Foundation

Ashlee Young, Interact for Health



CLAUDIA Y.W. HERROLD  
INTERIM PRESIDENT & CEO  
PHILANTHROPY OHIO

## President's Pen

When I came on board as interim president & CEO in June, I knew that change was already on the horizon at Philanthropy Ohio. Not only was there a work group focused on sustainability and a business model refresh underway, but there was also the departure of then-CEO Deborah Aubert Thomas, who was heading off to lead our umbrella organization, United Philanthropy Forum. Along with these changes and recognizing that our organization was ready to celebrate its 40<sup>th</sup> anniversary, it seems like a good time to pause and reflect on the past and present in order to inform the way forward into the future.

I was hired in 1998 as part of a staff expansion from three to over a dozen at what was then Donors Forum of Ohio, thanks to a major grant from the Ford Foundation to build what were called "regional associations of grantmakers." A mere year later, major change came as the Donors Forum of Ohio merged with the Cleveland Grantmakers Forum, forming one strong, dynamic statewide organization focused on helping grantmakers become more effective through learning and connecting activities, with a modest focus on public policy.

Fast-forward through new leaders (George Espy, Suzanne Allen and Deborah Aubert Thomas) and new organization names – Ohio Grantmakers Forum and then, in 2013, Philanthropy Ohio – and in my own quarter of a century of experience here, significant change has been undertaken, not for the sake of change but to respond to or anticipate changes in the field, in our members and in our state and country.

They were strategic changes crafted and implemented by strong staff and board

members dedicated to equity, integrity, voice, courage and community in a learning organization. We changed our vision and mission, grew membership and established, for the first time, a reserve fund for future needs.

During these years, our public policy work expanded from the first Education Initiative and sector issues to include other areas of members' interests: health, housing and democracy. The annual conference became a headline event leapfrogging among the three

***"Change is inevitable; growth is optional."***

***– John C. Maxwell***

C cities, with national thought leaders, an RFP process for break-out sessions and numerous awards presented. And communications channels developed through continual improvements to the website, newsletters and social media.

Today, we are poised for more change, and growth is not an option, it's a necessity. Many committees, the Board of Trustees and staff together are exploring ways to grow revenue and value through the Business Model Refresh facilitated by Mark Sedway of the Giving Practice. And, a Search Committee is digging into its work, with the help of the Benefactor Group, to identify candidates to become the next leader.

You'll hear more about these changes in the coming months, along with news on how we will celebrate our 40 years as Ohio's philanthropy-serving organization and look ahead to the next 40. I feel confident that our members, Board and staff will embrace change, grow, innovate and become an even stronger, more vital membership association that is indispensable to its members and to policymakers and external partners. ■

# The “Ten Trillion Dollar Trio”



**Nolan Bean**  
CFA, CAIA  
CIO, Head of Portfolio  
Management, FEG  
Investment Advisors

The recent trend of concentration in stock market returns reached staggering new heights in the second quarter, with Nvidia, Microsoft and Apple accounting for roughly 20% of the S&P 500 index and increasing to a combined market capitalization of \$9.7 trillion through quarter-end. This is roughly one-third of the U.S. gross domestic product of approximately \$28 trillion! The persistent success of these three stocks, in particular, has earned them a new in-house moniker, the “Ten Trillion Dollar Trio.”

## U.S. Large Cap Equities Unfazed by Economic Slowdown Pressures as S&P 500 Ascends to Record High

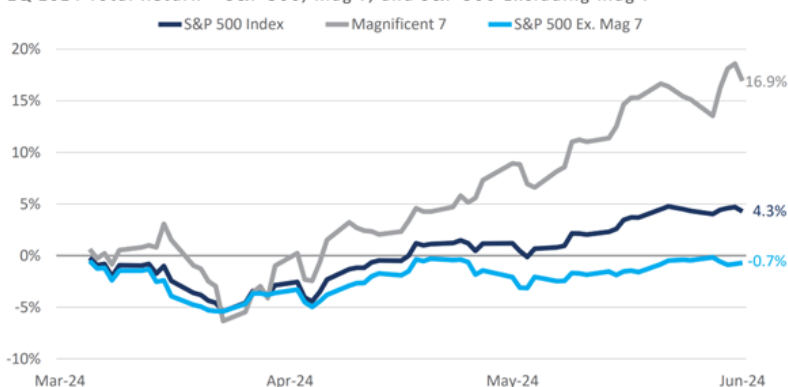
Despite stumbling out of the gates early in the quarter, the S&P 500 Index quickly regained its footing to post a 4.3% total return, adding to an impressive year-to-date gain of 15.3%. The Bloomberg Magnificent 7 Index posted a 16.9% total return for the quarter and a staggering 37.0% for the first half of the year, versus mediocre performance by the rest of the S&P 500, which saw a decline of 0.7% in the quarter and a relatively more modest return of 8.6% for the first half of 2024. Nvidia, a key global supplier of microchips essential to the adoption and proliferation of AI, has had an outsized influence on the concentration of the run-up in U.S. large-cap stocks, with a gain of 36.7% in the second quarter following an 82.5% return in the first quarter.

## Mixed Emotions and Disparity

The relentless rise in U.S. large-cap stocks over the past two years stirs mixed emotions. While the stock market is often seen as a reflection of the overall economic health, the benefits of its growth have been unevenly distributed. The top 10% of wealth holders own 87% of corporate equities and mutual fund

### MEGA CAP TECH STOCKS LED THE MARKET IN 2Q 2024

2Q 2024 Total Return – S&P 500, Mag 7, and S&P 500 Excluding Mag 7



Data source: Bloomberg, L.P.; Data as of June 30, 2024

shares, with the top 1% holding nearly 50%. The bottom 90% own 13%, with the lower half holding 1%. This disparity highlights a growing disconnect between Wall Street and Main Street, contributing to increased income and wealth inequality and societal tension.

## Main Street Considerations

Much like U.S. large-cap growth stocks have displayed leadership, the U.S. economy has enjoyed a similar position of relative strength. Since the 2020 year-end, the U.S. has averaged a 3.0% annualized GDP growth rate, outpacing key trading partners such as Japan, China and the eurozone. Despite some conflicting signals, the U.S. economy remains robust with tight credit spreads, decreasing inflation and moderated interest rate rises. This suggests the Fed has managed to control post-pandemic inflation without harming the broader economy.

## Reflections and Outlook

It is unusual for asset allocators to spend significant amounts of time on individual stocks like the trio. Given the concentration by market cap and performance in a small number of stocks, it behooves one to carefully consider. FEG believes these stocks to be an important part of a diversified portfolio and encourages clients to calibrate ownership relative to a stock’s weight in the market/index. Currently, we have calibrated a modest underweight to these stocks.

Overall, FEG recommends maintaining a long-term policy with a fairly constant risk posture and illiquidity budget tailored to individual portfolio objectives while allowing for tactical adjustments within investment policy statement parameters.

The team remains ever vigilant in monitoring markets and managers for new opportunities and risk to lean into or out of, respectively. ■

*Nolan Bean, CFA, CAIA, is CIO, Head of Portfolio Management for FEG Investment Advisors and a Professional Partner member of Philanthropy Ohio. You can reach Nolan by emailing [dverst@feg.com](mailto:dverst@feg.com).*

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## Exploring how to make democracy bigger than politics

As America becomes more divided and politics becomes a bigger part of people's identities, it's less likely that they'll recognize democracy outside of political contexts. Yet, philanthropy's engagement in democracy building is sometimes viewed with trepidation and uncertainty. Leaning into our values as community leaders and conveners has never been more critical than in our current moment.

At Philanthropy Forward '24, the Tuesday lunch plenary will explore making democracy bigger than politics in Ohio communities. Presenters Liz Blume, board president, Murray and Agnes Seasongood Good Government Foundation; Carrie Davis, director of the democracy program, The Joyce Foundation; Joy Ossei-Anto, managing director, funder engagement, PACE – Philanthropy for Active Civic Engagement; and Nicholas Turner, director of strategy and engagement, The Nord Family Foundation; will help attendees consider the relationship between democracy, politics and partisanship and how philanthropy can support solutions for democratic engagement that transcend ideologies and create healthier, more vibrant communities.

We asked the plenary presenters how democracy fits into the broader context of philanthropy and what they hope attendees will impart from their session. The answers are included below. To learn more and register for Philanthropy Forward '24, which will be held September 23 – 25 in Cincinnati, visit [www.philanthropyohio.org/philanthropyforward](http://www.philanthropyohio.org/philanthropyforward).



“ ... The plenary aims to influence funders to approach democracy-related investments more holistically ... ”



**Liz Blume**  
Board President,  
Murray and Agnes  
Seasongood Good  
Government Foundation

**What is one key message or takeaway you hope the audience will have leaving your plenary discussion?**

So much of what donors care about: better outcomes for children and families, creating and sustaining healthy environments and ensuring opportunities for all of our neighbors; all of these things are impacted by the work of government and public discourse. If our democracy is not healthy and people cannot have productive discussions with one another, everything else just gets so much harder. I think that has motivated the Seasongood Foundation to refocus our efforts on support for democracy over the next three years.



**Carrie Davis**  
Director of the  
Democracy Program,  
The Joyce Foundation

### How does democracy fit into the broader context of philanthropy?

All the issues we care about depend on having a healthy, functioning government that is responsive to public needs, including in marginalized communities, and makes decisions based on the best evidence. That's a high ideal, and if we are ever going to achieve it, we need to invest in building that kind of democracy.

### What is one key message or takeaway you hope the audience will have leaving your plenary discussion?

I often hear from funders that they hesitate to engage in democracy work out of fear of appearing political or partisan. Does that sound familiar? During our session, we'll talk about how that hesitation can backfire and why nonpartisan philanthropic engagement is critical and effective.



**Joy Ossei-Anto**  
Managing Director of  
Funder Engagement,  
Philanthropy for Active  
Civic Engagement

### What is one key message or takeaway you hope the audience will have leaving your plenary discussion?

The main takeaway is to recognize and reflect on the distinction between democracy and politics. The plenary aims to help funders invest in American democracy in ways that go beyond partisan politics, encouraging participants to consider democracy as a system of self-governance focused on fairness, equality, responsiveness and inclusion.

### What do you recommend the audience consider or reflect on before attending your plenary to enhance their understanding or engagement?

Attendees can reflect on their own understanding of democracy and politics, considering how they may conflate the two concepts. They could also contemplate examples of political activities that are not necessarily

“ All the issues we care about depend on having a healthy, functioning government that is responsive to public needs ... ”

democratic and democratic activities that are not inherently political.

### How do you hope your plenary will influence the audience's thinking or actions beyond the event, and what steps can they take to implement what they've learned?

The plenary aims to influence funders to approach democracy-related investments more holistically, separating them from purely political outcomes. Participants can implement this by critically examining their funding strategies to ensure they support democratic processes rather than specific political agendas, engaging in conversations within their organizations about the distinction between democracy and politics and developing frameworks to evaluate democratic impact beyond political outcomes. ■

## PACE's Questions to Explore in Making Democracy > Politics

- *What does the relationship between democracy, politics and partisanship look like?*
- *What do approaches to democracy that are larger than politics look like?*
- *How do we support democracy without "taking sides" on political issues?*
- *How do we know if democracy is healthy or successful?*
- *How do I differentiate between whether something is truly a threat to democracy, or if I just strongly disagree with it?*
- *How is "democracy work" different on the local/national levels?*
- *What is the unique role, opportunity or responsibility of philanthropy in nurturing a democracy that is larger than politics?*

Learn more at <https://www.pacefunders.org/pace2024/>.



## PLENARY SPEAKERS

### Philanthropy as a Feature Story

Monday, September 23, 1:30 – 3:30 p.m.

#### Dale Anglin

*Executive Director, Press Forward*

#### Eli Flournoy

*Co-founder and Managing Director, Media Growth Partners*

#### Kyle Kutuchief

*Director/Akron, John S. and James L. Knight Foundation*

#### Rita McNeil Danish

*Executive Director, Signal Ohio*

### Turning Trust into Impact

Tuesday, September 24, 8:30 – 9:30 a.m.

#### Jill Miller

*President & CEO, bi3*

#### Shady Salehi

*Executive Director, Trust-Based Philanthropy Project*

#### Meredith C. Smith, Ph.D.

*Executive Director, Cradle Cincinnati*

### Making Democracy > Politics in Ohio Communities

Tuesday, September 24, 12:15 – 2 p.m.

#### Liz Blume

*Board President, Murray and Agnes Seasongood Good Government Foundation*

#### Carrie Davis

*Director of the Democracy Program, The Joyce Foundation*

#### Joy Ossei-Anto

*Managing Director of Funder Engagement, Philanthropy for Active Civic Engagement*

#### Nicholas Turner

*Director of Strategy and Engagement, The Nord Family Foundation*

### Evolution or Revolution

Wednesday, September 25, 2024

11:30 a.m. – 1:30 p.m.

#### Yolanda Botti-Lodovico

*Storytelling and Advocacy Lead, The Patrick J. McGovern Foundation*

#### Valerie Goode

*Chief Marketing Officer, The San Francisco Foundation*

#### Lori Melichar, Ph.D.

*Senior Director, Robert Wood Johnson Foundation*

#### Carter Stewart

*Executive Vice President for Programs, The Mellon Foundation*



Dale Anglin



Eli Flournoy



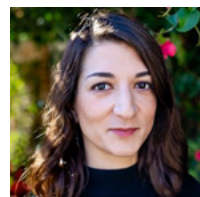
Kyle Kutuchief



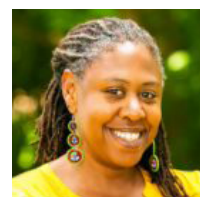
Rita McNeil Danish



Jill Miller



Shady Salehi



Meredith C. Smith, Ph.D.



Liz Blume



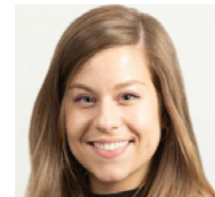
Carrie Davis



Joy Ossei-Anto



Nicholas Turner



Yolanda Botti-Lodovico



Valerie Goode



Lori Melichar, Ph.D.



Carter Stewart

## Keith Burwell retires from Greater Toledo Community Foundation



**Keith Burwell**  
Former President  
Greater Toledo Community Foundation

### What was your career path to the position you are leaving?

Life is never a straight line, and my introduction to the world of philanthropy or foundation leadership would be one example. After leaving the for-profit world and looking at career changes, I went to work for Michael Marsicano (retired CEO of Foundations of the Carolinas) at the Arts and Science Council in Charlotte, North Carolina, temporarily. Several years later, and in part through networking, I joined the Triangle Community Foundation. Again, it was funny that through networking, I was recommended by a CEO of an Ohio Community Foundation to be considered for the Greater Toledo Community Foundation (GTCF) CEO position. This seems a long way from the original directions of working in the family business or thoughts of teaching philosophy at a university.

### What advice would you offer to someone just entering the field?

Network, network, network! Both in your community, state and across the field nationally. You never know

what idea you may pick up or how you could solve an issue that another foundation or organization has already addressed. Always start with yes to the big question and work backward to the how – never start with the cost or the labor, but what do you want to solve or accomplish? If it should happen, the cost, the labor and all the other issues will fall into place. In the foundation world, we too often start with “no.”

### What would you change if you had a chance for a “do-over?”

Hindsight is always 20/20; I should have added the EVP/COO position earlier. The help managing the day-to-day operations and special projects has been a great benefit. Having this position in place 10 or 15 years ago would have been nice.

Otherwise, I would not change a thing; even when things did not go exactly as planned, we learned for the journey. I’ve always considered grants, right or wrong, as risk capital to solve our community problems or expand our community opportunities.

### What’s next?

Who knows? Everyone asks the question. I plan to be something of a ghost locally till the end of the year to allow our new CEO, Kate, to get up and running at GTCF. That said, I’ll take on some new adventure. I’m just not the kind of person who can sit on the front porch of the country store and play checkers all day like my grandfather did years ago.

### What will you miss (if anything) about your position?

The people, the staff – everything that has happened over the past 21 years happened because of the terrific staff at GTCF; the fundholders – every time GTCF stepped out to address an issue, GTCF fundholders joined the process; and the many organizations that serve our community working to make Northwest Ohio a better place to live. While I will still see everyone, it will be different since it will not be within the walls of GTCF. ■

## Meet HealthPath Foundation of Ohio's new president



**Kiana R. Trabue**  
President  
HealthPath Foundation of Ohio

### Best advice I ever received:

The best advice I ever received was to never stop asking questions. Asking questions is one of the most effective ways to develop curiosity. Questions help you learn, explore new ideas and challenge your biases and assumptions. Curiosity helps with building relationships, making others think and focusing their attention on you.

### How my career path prepared me for this role:

My 20+ year career includes experience in public health, nonprofit, public service and philanthropy. My experiences working in, with and on behalf of the community have

given me a unique perspective on how to best partner with community members and co-design homegrown solutions to society's most challenging issues.

### Three goals for the next 12 months:

- 1) Establish HealthPath as a well-informed, engaged, consistent, trusted funder that recognizes community members as change agents.
- 2) Leverage HealthPath's position as an intermediary to connect funders with community-based organizations who understand the local community and can drive health improvement.
- 3) Develop a data-driven strategic plan grounded in equity that is reflective of the unique needs of each community HealthPath serves.

### What I do when I'm not at work:

When I'm not at work, you'll find me traveling, curled up with a good book or spending time with my family, including my two children, Jayla and Jaxon.

### What I'm reading:

I am currently reading "The Four Agreements" by Don Miguel Ruiz. The book is a powerful reminder that the most important agreements are the ones we make with ourselves.

### Who I'm following on Twitter or blogs/ podcasts I subscribe to:

I'm a huge fan of the TV show This Is Us, so I'm currently listening to a rewatch podcast called That Was Us, which digs into the details of each episode. ■



## Julie Prettyman leads Marion Community Foundation



**Julie Prettyman**  
President & CEO  
Marion Community Foundation

### Best advice I ever received:

Here are a few of the advice nuggets I am holding onto right now: "Is the situation actually complicated or is it really quite straightforward, but you're making it complicated because it requires a lot of courage to make the straightforward decision?" (from James Clear's newsletter) And "Patience, patience, patience."

### How my career path prepared me for this role:

Being passionate about and getting connected to the community is the path that has set me up for this role. For the last 10 years, I've worked closely with volunteers to administer the Marion Community Foundation's programs. The result is dollars that have impacted local nonprofits and students. But more than just the mechanics of program work, this role gave me an understanding of the generosity of donors and their

stories. With this front-row seat, I have a deeper appreciation of the people and organizations in our community. Every day is unpredictable. Throughout my career, I've had positions that came with complexity and wearing lots of hats. That variety energizes me.

### Three goals for the next 12 months:

- 1) Be Present – Life is full right now, but I have the goal to not let the "new job" busyness let me miss the personal connections, new opportunities and everyday life.
- 2) Focus on the Team – Everyone at our foundation is essential. I don't want to lose sight that it happens with a team. I want to affirm the value of the whole team and hold on to our great culture.
- 2) Continue Great Things – I want to balance the next steps for the foundation with the great things we're doing today. Yes, I am definitely looking forward; however, I also want to stay mindful that this leadership transition builds upon our history and today.

### What I do when I'm not at work:

Faith, family, friends, farming, food, fun – These all overlap and blend together. My husband and I have a farm business, which keeps us hopping, especially in the spring and fall seasons. We're blessed to have family nearby, which gives us the opportunity to enjoy our parents and kids frequently. Oh, and good food! Exploring local restaurants anytime.

### What I'm reading:

"Level Up" by Ryan Leak. (He has a good podcast, too.) I also love audiobooks! Last year, I set a goal to listen to 100 books. I didn't quite make it, but I enjoyed the challenge, and it pushed me to listen to a wider variety. I was going to list a few, but I just scrolled through my library... it is too hard to pick. There are too many great ones. ■

Grants management practitioners and program officers convened for the annual Programs & Grants Summit on Monday, August 5, in Columbus.



Scholarship managers learned about the ongoing FAFSA changes and built connections with peers at the annual Scholarship Managers Summit in Dublin, Ohio, on Thursday, August 22.



More than 30 members attended the August Scholarship Managers Summit to connect with colleagues about pressing scholarship questions in a year of immense change and evolution in the scholarship space.



Brian S. Schultz, director of partnerships for Candid, shared about the "Demographics via Candid" information ecosystem at the Programs & Grants Summit in August.



Joshua Edmonds, DigitalC CEO, shared how they are building an affordable and equitable bridge to Cleveland's digital future through a citywide internet network and digital skills development programs.

# MEMBER NEWS

## New Staff and Promotions

**Cleveland Foundation**  
Bronlynn Thurman, program officer

**The Joyce Foundation**  
Julie Morita, MD, president and chief executive officer

**Kettering Foundation**  
Rhyann Green, communications assistant

**Greater Toledo Community Foundation**  
Kate Sommerfeld, president and chief executive officer

## Accomplishments

**Interact for Health**  
Megan Folkerth was named a 2024 Terrance Keenan Fellow

**Ohio Access to Justice Foundation**  
Kiko Yee was selected as 2025 Women WELDing the Way Honoree

**Saint Luke's Foundation**  
Tim Tramble Sr., was honored by The Phebe Foundation as part of their inaugural Annual Family Day Event

## Departures

**American Electric Power**  
Gretchen Brandt

**The Dayton Foundation**  
Mia Gilbert

**Fifth Third Foundation**  
Dianna Coley  
Carol Wright, retired

**Marietta Community Foundation**  
Courtney Wentz

**Ohio State Bar Foundation**  
Lori Keating

**Marion Community Foundation**  
Dean Jacob, retired

**Mt. Sinai Health Foundation**  
Daniel Cohn

**Morgan Foundation**  
Jeanne Silcox

**Greater Toledo Community Foundation**  
Keith Burwell, retired  
Christine Dziad, retired

**Westfield Insurance Foundation**  
Deborah Anderson, retired

## New Members

**Benefactor Group**

**World Group Foundation**

Please email staff changes and accomplishments to [adonahey@philanthropyohio.org](mailto:adonahey@philanthropyohio.org).



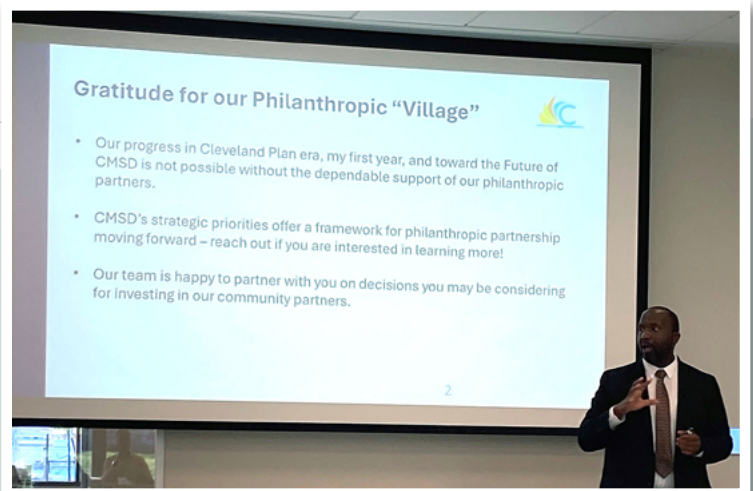
On Tuesday, September 10, Philanthropy Ohio members learned about the Cleveland Metropolitan School District's current state and future as it serves more than 36,000 students through its 6,500 employees, various strategic partners and the community at large.



Members convened to hear from Cleveland Metropolitan School District CEO Warren G. Morgan, Ed.D., about the district's long-term financial position and how educators and school district partners collaboratively provide high-quality, equitable educational opportunities for all.



Devin Cotton, Universal Basic Employment founder and CEO, and Ken Surratt, United Way of Greater Cleveland chief development and investment officer, discussed with members the Universal Basic Employment pilot, which will launch in 2026 and provide 100 participants with a three-year job guarantee of \$50,000.



Cleveland Metropolitan School District CEO Warren G. Morgan, Ed.D., shared the district's strategic vision and the opportunities and challenges facing Cleveland schools at a funder briefing on Tuesday, September 10.



**Empowering Change**

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## UPCOMING PROGRAMS

### SEPTEMBER

**23** Philanthropy Ohio Annual Meeting of Members | in Cincinnati and via Zoom

**23-25** Philanthropy Forward '24 | in Cincinnati

### OCTOBER

**9** Appalachian Ohio Funders Group | via Zoom

**15** CEO Coffee Chat | via Zoom

**29** Private & Family Summit | in Columbus

### NOVEMBER

**7** Emerging Leaders Peer Group | via Zoom