## Survive Together. Thrive Together.

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THE PITTSBURGH FOUNDATION 2021 REPORT TO THE COMMUNITY

## **Rising to** the Challenge

s this 2021 Report to the Community went to press, the United States had just passed a horrific milestone: at least 1 million dead since the onset of the pandemic virus COVID-19 two years ago.

The casualty count outstrips all this country's combat deaths from all the wars of the 20th century, and translated into life expectancy, the virus carved more than two years off the average life span, the largest decline in 80 years. Closer to home, nearly 3 million Pennsylvanians were infected and 45,000 died with the virus as a direct or probable cause.

All of these statistics are brutal markers of a tragic period that will leave a lasting imprint for decades to come. Beyond the public health catastrophe, the period was marked by what we referred to inside the Foundation as the "multi-pandemic" chapter. It was the phrase we adopted last year to contain the uncontainable.

As your community philanthropy, we continued to assist the region in recovery from COVID and related issues. Indeed, many of the challenges we faced were continuing episodes of crises that have been with us for decades — among them, homelessness and other forms of housing insecurity, lack of access to health care, inequitable law-enforcement practices, barriers to personal economic advancement, a yawning wealth gap tied to race, and a political-ideological divide tied to geography.

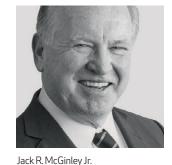
The virus also brought into stark relief the long-standing health and wealth disparities along racial lines, underscored by Allegheny County data. More alarming than those was the continuance of shocking incidents of systemic injustice costing the lives of Black Americans.

Addressing racial inequities has been part of the Foundation's work for most of its history. We joined many other philanthropic leaders in our region and across the country in acknowledging that past strategies had not been direct enough in challenging systemic discrimination along race

and income lines.



Lisa Schroeder President and CEO



Chair, Board of Directors

During an educational session on expanding Black homeownership, Tammy Thompson of Catapult Greater Pittsburgh—which focuses on helping clients in disenfranchised communities through financial counseling and other services – posed a probing question: "We have been dealing with many of these issues for a long time, so we can have some positive impact in the moment, but are we really making any difference for the long term?"

Thompson's question has been coming up from other grantee organizations, donors and community partners as well, leading to one of the distinct takeaways from last year's work. Thankfully, there is noteworthy evidence that people are willing to act more personally and are giving more generously to achieve fundamental social change that will raise quality of life for the long term.

In the financial section of this report, we cite the record-setting \$68.8 million in fundraising for 2021, which included a 29% increase from 2020 in giving by individuals. That generosity enabled the Foundation to distribute \$57.1 million in grants to 2,850 nonprofits and civic institutions.

donors and community partners are coming together with greater determination than we've seen in years to do more than Band-Aid philanthropy: Our Center for Philanthropy team gathered

some of our donors to deliver \$1.1million in grants to out-of-school-time programs as day care networks have struggled.

The Foundation's New Philanthropic Leaders a group of professionals ages of 22-40 — did hands-on research, made site visits and awarded grants to out-of-school programs serving Black, Indigenous and People of Color (BIPOC) communities.

While we are proud that a multitude of urgent community needs have been met through the funding, we also have asked: How many grants in any given year are directed beyond merely helping people hold in place? How many are creating opportunities for residents to thrive, especially for those in communities that have experienced decades of neglect?

To answer these questions, we are engaged in a strategic planning process that will demand of us a greater focus on what is required to realize thriving communities.

You'll see news here of expanding staff capacity to take on these challenges in collaboration with community partners, through the establishment of a Public Health team charged with managing 18 research funds and another now dedicated to engaging in policy and advocacy. We are grateful more than ever to the vigor-

ous and generous response of our donors, which strengthens our work and, in turn, maximizes their power to create a lasting legacy through their wills and estate plans. And for those who want to get involved, we are working to provide new opportunities for current donors to engage in the work of advancing equity and for the Foundation itself to increase diversity in the donor base.

We are thrilled to have this high level of collaboration, to be at the point of announcing a new plan in 2022 and then to move full force into implementation next year. But no matter the guide we have in front of us, we want our stakeholders to see themselves reflected in it and to be able to say, "We belong here. This is the Pittsburgh way of giving back."

May 16, 2022

#### **On the Cove**

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Sunrise over downtown Pittsburgh, as seen from the vantage point of the Mt. Washington neighborhood. IMAGE BY DAVE DICELLC

USED WITH PERMISSION

And, as you'll see in this report, our grantees,

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# **By the Numbers**

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The Foundation's contributions to the community illustrate the generosity of donors, the impact of grants on nonprofits and neighborhoods, the value of civic partners' assistance, and the dedicated stewardship of the Foundation's staff and Board. Last year's fundraising totaled \$68.8 million, breaking the record set in 2020 by \$1.1 million. Donations last year included \$22 million in gifts from individuals, up from \$17.1 million in 2020. Contributions from planned gifts such as wills, estates and trusts were also up significantly last year — \$32.4 million — compared to the \$18.5 million annual average raised over the past decade. Contributions from all sources translate into community benefit: In 2021 the Foundation distributed \$57.1 million in grants to 2,850 nonprofits, which included \$2 million in agency endowment funds to benefit specific nonprofit institutions. Grants from donor-advised funds totaled \$26 million. The Foundation and its supporting organizations granted a total of \$64.5 million in 2021.

For more information, including the Foundation's 990, please visit pittsburghfoundation.org/financials. Learn more about our grantmaking by visiting **pittsburghfoundation.org/grants-listing**.

FINANCIAL INFORMATION FROM 2021 IS PRELIMINARY PENDING THE RESULTS OF THE OFFICIAL AUDIT, WHICH SHOULD BE COMPLETED IN JULY 2022

Summary of Grants by Category			i	<ul> <li>Education</li> <li>Human Services</li> <li>Arts, Culture and Humanities</li> </ul>
DOLLARS (IN MILLIONS)				Health
				Public and Social Benefit
				Religion Related
	TOTAL GRANTS	***	6.3	Environment and Animals
	\$64.5			International and Foreign Affairs

\$19.9

\$18.3 \$7.8

\$7.0

\$5.2

\$4.2

\$1.6

\$0.5

Historical Assets and	
Grantmaking	\$3,000
<b>1945-2021</b> DOLLARS (IN MILLIONS)	\$2,500
	\$2,000
	\$1,500
	\$1,000
	\$500
	0 '45

**Asset Growth Over 10 Years** DOLLARS (IN MILLIONS)

> \$1,400 \$1,200 \$1,000 \$600 \$400 \$200

\$1,800

\$1,600



\$20 \$10

\$90

\$70

\$60

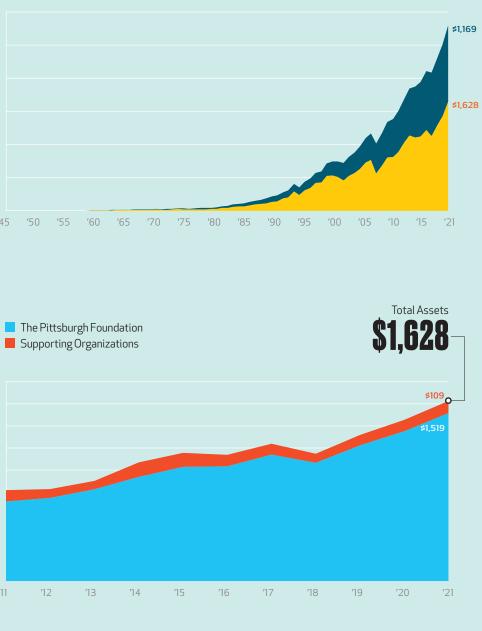
\$50

\$40

\$30

'11

#### Year-End Asset Valuation Cumulative Grants





\*\$55.1 million does not include \$2 million in agency endowr

# **Exponential Impact**

Planned gifts seed support for decades.

By Kitty Julian

hat will your legacy be? It is a question that The Pittsburgh Foundation and its affiliate, The Community Foundation of Westmoreland County, have been posing to donors and advisors for generations. Each year, 70 to 80 donors formally establish funds at the foundations through their

wills and estate plans. Three to four times as many do not alert the foundations in advance, and their planned gifts come as welcome surprises.

Last year was exceptionally active for planned giving. More than \$30 million went to the foundations as estates settled. This includes proceeds from life insurance, stocks and bonds, and other assets. The average annual planned gift total from 2012 through 2021 was nearly \$20 million. Some donors memorialize loved ones with planned gifts supporting what mattered most to them in their lifetimes. Other forms of giving, such as charitable remainder trusts, provide financial support to heirs during their lifetimes and only transfer to the foundations after the heirs have died.

Sometimes, in the decades before a planned gift is realized, donated assets increase significantly in value thanks to compounded interest and market

performance. That exponential growth translates into a grant-making legacy that far exceeds what donors may have initially imagined (see projection *on page 7*), transforming lives and communities.

"The message is that donors, regardless of their level of wealth, can establish a legacy through The Pittsburgh Foundation to forever honor and memorialize loved ones while also providing resources for themselves and their heirs during their lifetimes," explains Lindsay Aroesty, vice president of Development and Donor Services, and an expert in planned giving.

Kitty Julian is director of Communications at The Pittsburgh Foundation.



### **The Goughs' Legacy**

Siblings Robert and Winifred Gough of West View lived simply, and neither married. Winifred was a secretary for U.S. Steel, and Robert worked at Keller Office Equipment on the North Side. He also quietly invested in the stock market, leaving a sizable fortune when he died in 1989. That year, Winifred established a charitable remainder trust of \$2.5 million to provide income to three of their friends and relatives during their lifetimes. She died in 1990. By the time the trust's assets were transferred to the Foundation in 2021, the value had grown to almost \$9 million, of which \$4.4 million will be used to make grants to address the greatest needs in the community. The remaining \$4 million is designated to benefit the Carnegie Library of Pittsburgh.



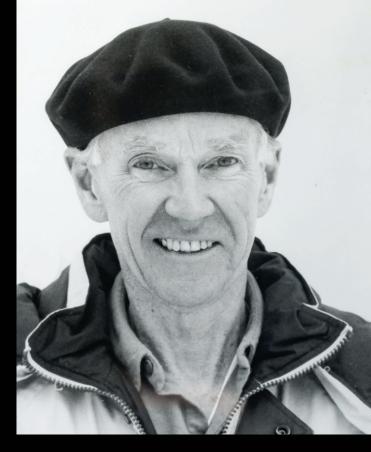
### **The Diabs' Legacy**

In 2007, Georgette Diab was partially paralyzed in a surfing accident. Her parents, particularly her father, Alfred, who was an engineer, cared for her as she recovered and learned to walk again. She was devastated when, a year after her accident, he died. As a talented engineer herself, she began thinking about how she could actualize his dream of establishing an engineering scholarship. In 2020, her mother, Eugeny, who loved music, died, and Georgette wanted to honor her. Last year, working with attorney C.J. Jacques, she established two scholarships — the Alfred George Diab Engineering Scholarship and the Eugeny Diab Music Scholarship — at her alma mater, the University of Pittsburgh, to benefit students who have experienced disability, homelessness or loss of their parents and have financial need. In her will, Georgette has committed all assets in her estate to these scholarship funds.

Left: Robert M. Gough, 1942. Right: Winifred Gough's senior photo from Peabody High School,1933. MAGES COURTESY OF THE GOUGH FAMILY

Harry Corbett, circa 2009. IMAGE BY FLORENCE CORBETT





### **The Corbetts' Legacy**

Harry Corbett, who died last November, filled his 98 years with generosity and creativity. As a young man, he served as a Navy lieutenant in World War II. When he returned from WWII, he earned an economics degree from Washington & Jefferson College and began what would be a long and successful career as an insurance executive for MetLife. A lifelong learner, he picked up photography after taking a class at the University of California in Berkeley and later went on to exhibit his work. He also loved chamber music and, in the 1960s, helped form the organization now known as Chamber Music Pittsburgh. After retiring, he volunteered as a reading tutor for Literacy Pittsburgh and remained committed to education. To honor his devotion to education, his family established the Corbett Family Fund to provide scholarships for students in grades K through 6 from Pittsburgh's Hill District to attend private school.

**"Amassing wealth** is not going to put you in a better position in the afterlife. Instead, think about the avenues you have to help others and express your gratitude. **Giving is the best** thing you can do."

-Georgette Diab



'When we started discussing her will, Georgette Diab expressed to me how she wanted to honor her parents and what mattered most to each of them. I've worked with the Foundation for more than 20 years and know that they prioritize donor intent. Working with the staff allowed her to be both creative and specific in defining and honoring that charitable intent.

-C.J.Jacquesestate planning attorney



### **Projecting the Impact** of Planned Giving



not including the potential for compound interest.

# Foundational **Supports**

Children's programs recovering after COVID crisis years.

By Cristina Rouvalis

s it threatened people, COVID-19 also posed a threat to child care and out-of-school-time programs, which had been financially anemic even before the crisis. They were included in shutdown orders issued in the early days of the pandemic, and some never reopened. Those that did confronted staffing shortages, low enrollment and new costs for masks, sanitizer and other protections from the virus.

With tuition down and expenses mounting, child care programs, especially smaller operations serving Black, Indigenous and People of Color (BIPOC), struggled. To continue serving children, they innovated to secure new revenue sources.

The Pittsburgh Foundation's Center for Philanthropy and Program teams bolstered those efforts last year by matching interested donors to specific programs. Corporate and individual donors responded to the urgent need: Child care is the backbone of the economy, allowing employees, especially women, to return to work. Lack of child care was a major factor that drove an estimated 3.5 million women out of the workforce in 2020. While some child care services returned last year, there were long waitlists and many women continued to stay home.

To explain what is at stake for children and families in city neighborhoods such as Homewood and the West End, Center for Philanthropy staff conducted a virtual webinar for potential donors. Leaders of three out-of-school programs, H.O.P.E. for Tomorrow,

> Total **Out-of-School-Time** Grants 2021

# **\$351,632** Out-of-School-Time Grants from Donor-Advised Funds



Students Anthony Ferguson, 11, left, and Jae'Ron Lee, 10, build an underwater robot at the Citizen Science Lab, a grantee organization, in the South Hills. The project teaches students to build remotely operated vehicles from a kit of low-cost, easily accessible parts and then navigate it through aquatic obstacle courses. Part of the national SeaPerch robotics initiative, students learn engineering concepts, problem solving, teamwork and technical applications of robotics. IMAGE BY NATE SMALLWOOD

Grantee organization ARYSE, the Alliance for Refugee Youth Support and Education, is a student-centered organization supporting immigrant and refugee youth in becoming engaged, confident and celebrated. From left, Masoka, Chantele and Salha are members of the organization's After School Club, which meets at Duquesne University. The club helps immigrant and refugee high school students overcome educational and social barriers. (Last names withheld at the request of ARYSE.)

STEM Coding Lab and the Maker's Clubhouse, explained how providing nurturing supervision from 3 to 6 p.m. daily keeps children academically engaged, safe and out of the criminal justice system.

These programs also served as lifelines for working parents when schools went remote, converting to all-day learning hubs where students could plug into classes and receive three meals. These extended hours meant the programs had to cover higher staffing, utility, internet, transportation and food costs. The centers' leaders, who have close relationships with parents and guardians, also delivered food to families in need and referred them to social services. "They are like community centers," Kelly Uranker, vice president of the Center for Philanthropy, explains.

Out-of-school programs also offer enrichment opportunities such as computer science and 3D printing, which are not available in many schools. "They are a tool for education equity, providing extended learning opportunities that students wouldn't ordinarily have access to," says Jamillia Kamara, program officer for Education at the Foundation. "These students tend to be Black and Brown and from economically insecure environments. Through their participation in out-of-school-time programs, students have the opportunity to work with staff and embrace their strengths, learn and grow."

While the out-of-school-time programs are usually free, child care can be prohibitively expensive, especially for families living at the margins. "Child care is one of the largest expenses for families; it can cost more than rent," says Chris Ellis, the Foundation's program officer for Healthy Children and Adults.

Corporate donors, young benefactors and others responded with generous contributions last year. A stand-out example is Schell Games, the educational video game developer headquartered in Pittsburgh. Center for Philanthropy staff presented a giving group program for Schell employees. Attendees learned about various nonprofits with pressing needs and gave \$10,000 to child care and out-of-school programs.

Because of such generous donors and recognition of the need for these programs, The Pittsburgh Foundation has increased giving 15-fold since 2017.

Cristina Rouvalis is a freelance writer.





IMAGE PROVIDED BY INATION MENTORING



IMAGE BY NATE SMALLWOOD

1Nation Mentoring, a grantee organization, offers in-school and out-of-school programming for African American youth. At left, a Slippery Rock University ropes course builds leadership, teamwork and confidence in participants.



## Young Donors Step Up

When The Pittsburgh Foundation's New Philanthropic Leaders met in June to brainstorm about where to channel their resources in 2021, the young professionals decided to focus on education through the lens of racial justice by supporting out-of-school-time programs.

The 13 members, all between the ages of 22 and 40, are contributors to the New Philanthropic Leaders Fund. Each gives \$1,000 a year (matched by the Foundation) toward building a region in which everyone has opportunities to thrive.

Members visited out-of-school programs that provide safe and enriching environments for children in economically struggling neighborhoods, then chose three finalists.

They were: 1Nation, a mentoring and youth development program for African American students; Bible Center Church, which runs a maker's clubhouse in Homewood that focuses on science, technology, engineering, art and math (STEAM); and ARYSE, the Alliance for Refugee Youth Support and Education, which serves immigrant children in Allegheny County. All three organizations also received Foundation-directed grants.

The New Philanthropic Leaders invited their families and friends to attend a virtual pitch event with the finalists. Participants made a \$20 donation to one of the three nonprofits. Altogether, 1Nation received about \$15,000, and the other two nonprofits each received almost \$13,000.

For Shaun Wickett, a 28-year-old software engineer at Amazon in Pittsburgh and a New Philanthropic Leader, the experience was more rewarding than simply writing a check. He enjoyed learning about the programs because "childhood is one of the most formative times. It's when kids develop and become who they are."

Citizen Science Lab Lead Instructor Garrett Struble helps student Najm Smith, 10, build a component for an underwater robot. Struble has a Master of Science from Duquesne University and is pursuing a career that combines his love of science and his passion for teaching. At Citizen Science Lab, he enjoys passing along his knowledge and seeing students' eyes light up as they begin to understand the process of scientific discovery.

# **Historic Legacy**

Life's work of Black abolitionist endures through field-of-interest fund.

By Deanna Garcia

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**ike many formerly enslaved people** in the year 1877, 100-year-old Aunt Peggy had her freedom but little else. Freed Black women who were too old to continue laboring were often relegated to the basement of the last home where they'd worked.

That year, Aunt Peggy, whose full name was Margaret Donaldson, was living in a dark, damp cellar. When her friend, Mary Peck Bond, learned about her living conditions, she began searching for a more suitable place for Aunt Peggy to live. That quest 145 years ago is connected to The Pittsburgh Foundation today through a field-of-interest fund that supports services such as assisted living and nursing home care for Pittsburgh's low-income Black seniors.

Bond was the daughter of a successful Black entrepreneur whose restaurant in Downtown Pittsburgh was a stop on the Underground Railroad. As a girl, Bond looked after those hiding in the basement of her father's business. As an adult, she retained that drive to help.

Bond found Aunt Peggy an apartment, then she and her friends worked for several years, raising enough money to purchase a property that would provide housing for more formerly enslaved Black women. On July 4, 1883, the Lemington Home for the Aged opened with four residents, including Aunt Peggy.

"The Lemington Home for the Aged was one of the first homes in America for retired and widowed Black domestic workers and formerly enslaved people who had nowhere else to go," says Michelle McMurray,

the Foundation's vice president for Program and Community Engagement.

Having a place to call home for the rest of her days was a tremendous gift for Aunt Peggy. She was born into slavery in Maryland; her parents had been forcibly taken from their home in what is now known as the Democratic Republic of the Congo. Her father managed to preserve his African name of Singo, so, as a child, Aunt Peggy was known as Margaret Singo. Around the age of 12, she was sold to a Pittsburgh woman and taken without so much as a goodbye to her parents and brothers and sisters. She married late in her adulthood, becoming Margaret Donaldson, and she and her husband, John, had several children. Aunt Peggy outlived them all.

At the Lemington Home for the Aged, she stayed active by tending to the garden. A Pittsburgh Press article about her from 1891 quotes her as saying, "I am treated very kindly here, and my friends also are good to me. I like the home very much, and it is quite a consolation to know I will be cared for, as I have no relations alive to look out for me." She passed in 1892, at around 115 years old.

Meanwhile, Bond and her friends knew there were more women in need of housing. They bought a larger house in what is now Market Square; then, in 1900, a 33-bed facility was built in East Liberty and opened as the Lemington Home for the Aged. Bond lived at the home until her death in 1926. This facility thrived for more than 50 years, expanding to a 180-bed modern nursing home facility called Lemington Center and opening the 80-unit Eva P. Mitchell Residences in the early 1980s. Mitchell (top) is displayed in the lobby of the apartment building in Lemington that bears her name. Her son, the late former Pittsburgh Police Commander Herman Mitchell, who was well-known in the Pittsburgh community, was a Lemington Home board member who helped raise money for the residence and named it after his mother. The portrait of Mary Peck Bond once hung at the now-closed Lemington Home for the Aged. It is currently stored in the Lemington Home Corps. archives, which are held by Lemington Residential Corp. Board Member Joy Starzl. IMAGE BY KITOKO CHARGO

A large portrait of Eva P.







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The Lemington Home's

long and storied

history has been

told in newspapers,

and so much more. A cache of historical

documents is kept by leadership of the Lemington Home Corp.

fundraising materials

An illustration of the Lemington Home for the Aged from archival documents.

The expansion and rising costs of care nearly forced the original home's closure. Grants from the Foundation and other city philanthropies kept endowment. With nearly \$2 million from community members, churches, corporations, and Black sororities and fraternities, the Lemington Home Fund was established at The Pittsburgh Foundation in 1986. The Lemington Residential Corp., a nonprofit, all-volunteer, Black-led and Black-serving organiza- Bond's legacy is remembered." tion, manages the nonprofit.

In 2005, the Lemington Home for the Aged was permanently closed, but the Lemington Residential Corp. continued to operate the Eva P. Mitchell Residence in Lincoln-Lemington. The Lemington

Home Fund is one of the Foundation's largest field-of-interest funds focused on senior care.

"During the pandemic, the Lemington Residential the home running while money was raised for an Corp. applied for a grant through the Foundation's Emergency Action Fund," says McMurray. "Since that time, we have continued to build our relationship with the group's leaders, who are committed to caring for vulnerable African American seniors in Allegheny County and to ensuring that Mary Peck

> Last year, the Foundation awarded a two-year, \$150,000 operating grant for the Eva P. Mitchell Residence, which provides 81 affordable studio and one-bedroom apartments to lower-income seniors. In 2021, the Lemington Home Fund awarded

grants to the Macedonia Family and Community Enrichment Center, Bethany Community Ministries and Lifespan to continue care and programming for seniors. These grants have helped to realize Bond's original vision of making sure Black elders are cared for and housed.

Bond's headstone reads, "We the underprivileged do the impossible with nothing." Through the Lemington Home Fund, the Foundation honors the work that she started and is sustained by the Lemington Residential Corp.

Deanna Garcia is a communications officer at The Pittsburgh Foundation.



IMAGES BY KITOKO CHARGOIS



## Greater **Flexibility** for Donors

Field-of-interest funds provide grants to areas of donor interest. Unlike a donor-advised fund, through which donors give to any nonprofit organization, a field-of-interest fund supports broad areas of concern. For example, a fund could be directed to make grants benefiting the arts, the environment and early childhood education or to address issues of aging and caring for seniors. Specific organizations are not named in field-of-interest funds, but grants must be made within the area specified by the donor.

Number of field-of-interest funds at The Pittsburgh

Foundation.

**Field-of-interest funds** dedicated to the care and benefit of older adults.

**Grants from field-of-interest** 

funds in 2021 to support seniors.

# Many Happy Returns

**Board member Lee Foster's guidance generates marked growth.** 

By Kitty Julian

ince 2013, when Lee B. Foster II joined The Pittsburgh Foundation's Board, he has invested himself in increasing the Foundation's financial power to do great things. The result: Assets under management as well as dollars for grantmaking rose significantly.

This is a testament to Foster's astute guidance as chair of the Investment Committee, a role he has held from 2017 to the present. He also served on the Audit

and Finance committees through 2021. For community foundations, asset growth isn't

just a measure of wise management of market forces. It translates directly into additional grant-making dollars to benefit the community. During Foster's tenure, total foundation assets grew from \$1.05 billion to \$1.45 billion. Over that same period, cumulative grantmaking grew from \$700 million in 2013 to \$1.1 billion by the end of last year.

Pittsburgh Foundation board member Lee B. Foster II learned about investing and business on the job at L. B. Foster Co., which his father founded in 1902 to provide rail transportation to mines, logging camps and quarries. It's now a publicly traded global company. IMAGE BY JOSHUA FRANZOS

Jonathan Brelsford, the Foundation's senior vice president for Finance and Investments, believes Foster's calm and insightful leadership was "critical to this growth." He credits Foster with encouraging the Foundation to explore alternative investments, especially private equity and venture capital, and introducing the Foundation to private capital managers who staff would not have met otherwise.

Those introductions paid off. As Foster predicted, investing under the private equity umbrella has delivered higher-than-expected returns.

The Foundation's return-on-investment goal for private equity is 5% above what is realized in public market investments. But the private equity portfolio's performance over the past several years has far surpassed that, delivering annualized returns of as much as 10.2%.

With Foster's encouragement, the Foundation has more than doubled its stake in private equity—from 15% to 35%—and all indications are that the strategy will continue to deliver strong returns in future years.

"Successful alternative investing relies on an experienced and skilled investment committee and staff. The Pittsburgh Foundation is fortunate to have both, and this will inevitably result in accessing top managers who produce superior results."





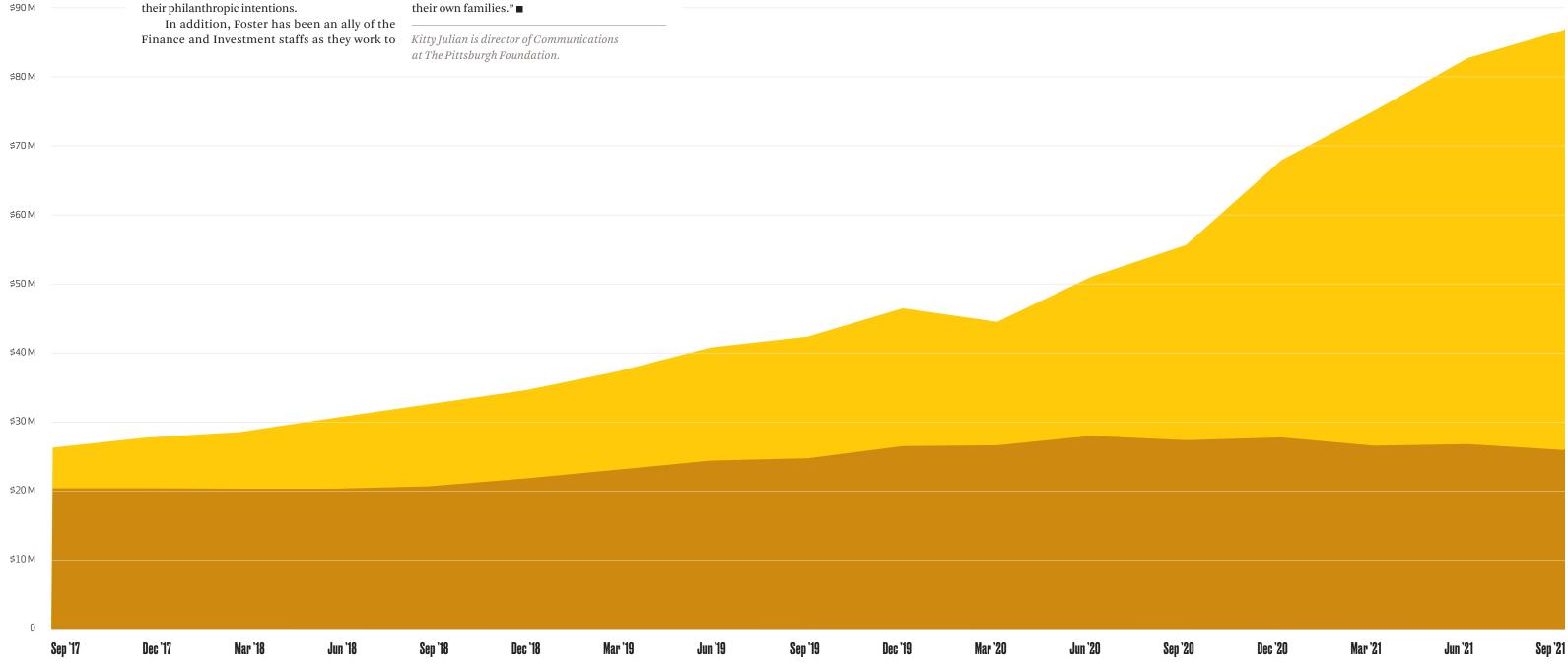
**Private Equity Investment and Return** 

Ending Market Value the total value of the Foundation's private equity portfolio.

The Foundation's net investment in private equity.

has guided significant structural changes in the investment program, including reducing costs by selecting new partners and streamlining processes. Both of those moves have reduced fees. Legacy Fund charges, for example, have dropped 12 basis points, which translates to a savings of \$576,000 per year. The Foundation also increased from three to five the number of investment portfolio options available to donors. More options mean more opportunities for donors to align their risk-and-growth strategies to their philanthropic intentions.

Beyond advising on investment strategy, Foster increase the diversity of the Foundation's outside financial managers. The investment industry is overwhelmingly run and staffed by white men despite what Brelsford says is strong evidence that teams with greater diversity in race and gender, as well as those inclusive of people with disabilities, have been shown to provide superior performance. "By pushing our investment managers to diversify their staffs, we're looking for positive impact on the portfolio. Also, we want to provide more people with access to an industry that can build wealth for their own families."



\$100 M

The Foundation's investment in private equity grew significantly during Lee Foster's tenure on the Investment Committee. When he joined the committee in 2017, the Foundation had a private equity portfolio but was not actively investing in it. Foster encouraged the Foundation to start small and reinvest returns, a strategy that has yielded significant results. By September of 2021, the Foundation's cumulative net investments in its private capital portfolio had grown to \$26.0 million, with an ending market value of \$86.5 million, an increase of 339% from 2017.

# Preparing for Liftoff

Westmoreland County foundation helps launch human services department.

by Kitty Julian

**f human services providers** in Westmoreland County are exhausted, it's no wonder. More than 160 government and nonprofit agencies are trying, without formal coordination, to serve 355,000 people who live in urban and rural areas across the massive county.

In the past, providers have banded together informally to harmonize services and solve problems. That began to change last year thanks to findings of a study funded by The Community Foundation of Westmoreland County (CFWC), United Way of Southwestern Pennsylvania and the Westmoreland County Commissioners. The project, which looked at human services providers operating for five years or more, tapped the expertise of dozens of providers and analyzed how 12 other counties organize human services delivery to improve quality of life for residents.

The report "Improving Human Services in Westmoreland County" recommends that the commissioners create a county human services department and hire a professional to direct it. The report offers



### "A coalition of providers is stronger than each provider on its own."

---McCrae Martino executive director of The Community Foundation of Westmoreland County VGES BY NATE SMALL





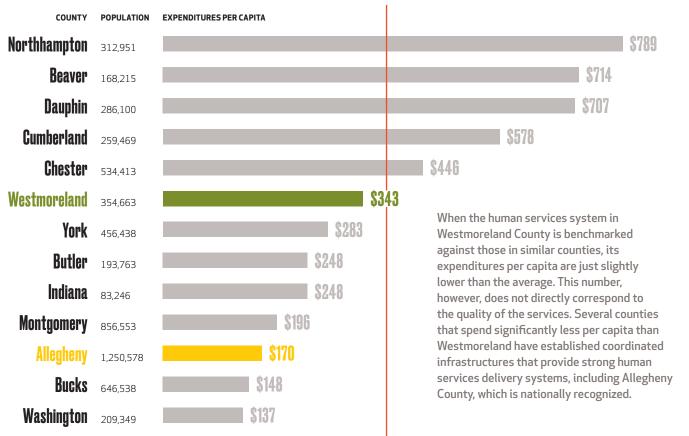
"If you need it, we have it here, and it's cheap," says Christine Marquis, manager of American Architectural Salvage, a program of Westmoreland Community Action and one of the organizations that would benefit from service coordination by a human services department of county government. For Marquis, AAS is not just a resale store for recycled construction materials and oddities. It's a five-acre center of community life that hosts events and provides real-world work experience. Volunteers include adults in the justice system and college students looking for service hours. High school students with autism come every Tuesday through the Westmoreland Intermediate Unit's Work Discovery Program. "Every time we have volunteers, we're able to provide job training. When people leave here, they've learned something and they're happy because they're learning."

evidence of dramatically improved quality of service and efficiency through coordination of providers in Westmoreland, which ranks among the largest dozen Pennsylvania counties by both population and land area. Westmoreland County officials, with funding from CFWC, are searching for a director. The county commissioners hired a consultant in February to lead the search. They're expected to hire a director this year. Funding from the Richard King Mellon Foundation will support the position.

The study found that Westmoreland's investment in human services is \$343 per person per year, double the amount spent by Allegheny County, which has a population of 1.25 million and a nationally recognized human services department.

As executive director of CFWC, McCrae Martino has been a leader in the movement to incorporate a human services department into county government. Having department status, she says, will better serve the county's elderly, those with disabilities and other

### **Human Services Expenditures** per Capita in Comparable Counties



vulnerable populations. In addition, she says, it will serve as a convenor and help provide resources, establish goals and improve data sharing.

"A coalition of providers is stronger than each provider on its own," says Martino. "A director of human services leading a department will be able to delve deeply into what's happening in communities, meet with providers to assess needs and help develop solutions."

Study funders expect that elevating human services to a department will enable development of data sharing systems that will cut red tape and make life easier for people served and providers.

needs food assistance or other services, shared data systems can make referrals and eligibility paperwork happen faster and be easier to complete," says Martino. "That's a long way off, but it's just one of the ways that county dollars invested in human services could be spent in a more strategic way and make it easier for clients to get the services they need."

Service coordination is especially critical in rural areas, such as Westmoreland County, where scarce public transportation can make getting to appointments difficult for low-income residents without cars. In addition, the county's large size is challenging to providers who drive to clients' homes.

Jordan Pallitto of The Hill Group, which conducted the study before he became chair of the CFWC Advisory Board, acknowledges the work service providers managed to accomplish without central leadership. "They have done a tremendous job collaborating informally and have managed to innovate even without the critical infrastructure that many other counties have," he says. "Hats off to the providers, but just imagine what they could do with more structure and coordination." Read the report at **cfwestmoreland.org/reports.** 

*Kitty Julian is director of Communications* at The Pittsburgh Foundation.

"If a client goes to a housing agency but also



## Provider Persistence

Mandy Zalich is CEO of Westmoreland Community Action, which fills gaps and builds bridges across agencies, a perch from which she clearly sees service coordination as key to improving lives and reducing poverty. Her agency assists about 15,000 peop a year with a wide range of services — from prenatal care to economic development to mental health crisis intervention.

"I see every day how essential it is for providers to come together to coordinate, trouble-shoot and share resources," says Zalich. She also recognizes that, without a human services department and director, there is a limit to what providers can do on their own. "We aren't in charge of county human services dollars, so there's only so much change we can create. But someone bringing resources and people together from inside the county and with access to county human services block grants? That would make it possible for us all to pull together."

### A Vast Rural Service Area

Human services providers in Westmoreland County assist people spread out over more than 1,000 square miles.



Human Services in Westmoreland County include:

- Basic needs, including food and shelter
- Children, youth and family services
- Employment and job training
- Immigrant and refugee services
- Mental health
- Services for older adults
- Services for people with disabilities
- Veterans affairs
- Substance use disorder services

# **Investing** for Healthy Communities

A new vision for the Foundation's public health-related grants.

by Ellen Mazo

all it enlightenment, as much as transformation. For when The Pittsburgh Foundation's staff and Board looked back on 70 years of medical research funding, they realized that many long-standing health care disparities by race and low economic status had not been addressed. In fact, the Foundation's emergency response to COVID-19 brought fresh evidence of health inequities.

That sobering review last year prompted the Board to establish a Public Health department with a high-bar goal of eliminating disparities.

Public health is a priority area in the Foundation's overall effort to address disparities in many aspects of daily life. But the department will be taking on other significant responsibilities, including management of 18 medical research funds, which are directed toward disease prevention and cures.

Public Health department staff will work with community, organization, funder and institutional partners to address the underlying causes of health disparities through grantmaking, research and strategic convenings.

These efforts will address disparities in access to physical and mental health care, support a healthy and safe environment, and be responsive to emergent issues of public health in the region. Michael Yonas, the Foundation's vice president of Public Health, Research and Learning, says his team will focus on problems affecting social determinants of health, including environmental risks, gun violence, youth



IMAGES BY JOSHUA FRANZOS

Standing off Fourth the Foundation's Public Health, Research and Learning staff (from left): Jenn Sloan, social change in community hropy fellow; Michael Yonas, DrPH, ice president; Tika Good, progr associate; Kara Rubio ublic health in hropy fellov Emily Toal, program assistant; and Nicole nger, program officer. Not pictured: Jill Ritchie, senior program administrat

justice reform, housing insecurity and uninsured/ underinsured adults and children.

The pandemic, as well as broader social demands in recent years, spotlighted the intensity and gravity of health care disparities, says Yonas.

COVID-19 underscored the urgency to enact equitable public health measures, as the virus disproportionately affected Black, Indigenous and People of Color (BIPOC) communities as well as residents in economically struggling neighborhoods. Foundation staff saw firsthand the needs of community members and the nonprofit organizations that serve them when Allegheny County officials tapped them to distribute \$1.62 million of the federal government's CARES Act funds designated for COVID response.

That the county chose the Foundation to allocate the CARES money was a recognition of its strong relationships with small Black- and Brown-led community-based organizations. Those will continue to be crucial as the Foundation ramps up its public health work. "Data alone does not solve these problems," says Yonas. "The relationships the Foundation has established will be an excellent resource."

The ultimate goal, he says, in employing extensive regional connections, resources and expertise "is to help communities not just survive, but to thrive."

In addition to relying on relationships, the team stands on a solid underpinning of grant-making experience. For more than a decade, the Foundation's medical funds have helped finance research across a broad spectrum of diseases, including cancer, Alzheimer's, arthritis, diabetes, heart ailments and blindness. The portfolio represents Foundation donors' long-standing support of exceptional medical research that often leads to significant public health benefits in the Pittsburgh region. One example: a two-year, \$150,000 research grant awarded late last year to analyze risks of adolescent substance use.

Eliminating persistent health disparities is a formidable goal, but Yonas says the Foundation can make a difference by "using a community-engaged, public health approach in collaboration with other foundation, public- and private-sector partners."

Ellen Mazo is a freelance writer.





## Studying Disparities in Alcohol Treatment

As The Pittsburgh Foundation's Public Health department moves into full operation after its launch last year, it will already have in its portfolio a noteworthy project designed to address disparities in treating alcohol-related problems of Black, Indigenous and People of Color (BIPOC) and LGBTQ+ young adults. Last year, the Foundation approved a two-year, \$150,000 grant through its medical

Last year, the Foundation approved a two-year, \$150,000 grant through its medical research funds to the University of Pittsburgh to help establish a Regional Alcohol Research Center. The center partners with community members to conduct innovative research.

Lead researchers at Pitt, Brooke Molina, professor of psychiatry, psychology and pediatrics, and Sarah Pedersen, associate professor of psychiatry and psychology, will focus on structural factors and other issues that contribute to health inequities in alcoholism treatment for individuals in their 20s and 30s.

"Exposure to stress arising from structural and interpersonal discrimination can drive people to use alcohol as a coping mechanism," says Molina, "and over time, it becomes increasingly difficult to control."

By partnering with community groups in marginalized neighborhoods, the researchers in collaboration with scientists from Pitt's public health, pediatric and internal medicine departments — hope to improve understanding of how such deep-rooted stressors lead to alcohol-related problems.

In addition to improving personalized treatments for alcoholism, Pedersen wants the center to "inform public policy to greatly reduce health inequities."

# **Promoting Progress**

Pittsburgh Foundation advocates move communities forward.

By Ervin Dyer

ot long after the Foundation launched its Policy and Community Impact department in 2020, the region was confronted with the epic calamities of the Covid-19 pandemic, an economic shutdown and a racial reckoning fueled by the murder of George Floyd.

Each of these exposed deep racial inequities in health care, housing and community safety. The crises, however, also presented an opportunity for the Foundation to reimagine and refocus efforts to achieve policy change that builds better, stronger communities. For the first time in Foundation history, an in-house team was formed to do just that — collaborate with like-minded organizations across the state, propose legislation and, if needed, directly lobby government officials.

The Policy and Community Impact staff worked with the Board to develop an innovative internal structure aimed at bolstering vulnerable populations and strengthening the Foundation's direct-advocacy power. Community foundations like The Pittsburgh Foundation have the right to engage in direct advocacy, while private foundations do not.

That structure unfolded as nonprofits, human services agencies and cultural groups faced a storm of disruptions and challenges from job losses to food insecurity.

As the team members responded, they learned valuable lessons, says Phil Koch, who became vice president, Policy and Community Impact in December 2020.

One of those, he says, is that good policy supports community. "You can raise money to support basic

needs, and that is important, particularly in times of crisis. But if you want to unravel years of systemic racism, you need better policies."

To ensure equitable treatment in systems, says Koch, multiple voices — donors, elected officials at various levels and grassroots leadership — must be brought to the table. When that happens, he says, "you get better policies."

The Foundation's approaches to problem-solving may include collaborating with the Program staff on recommending funding to grassroots groups to amplify their voices and stay current with them on community needs; influencing public officials to advance legislation; and producing reports to influence policy change.

Key to effecting change, says Koch, is building coalitions that boost the capacity of nonprofit organizations to advocate. He explains that the magnitude of the pandemic and its consequences have reinforced that "we can't do this alone."

For the work to have its greatest impact, the Foundation will need to collaborate with private and community partners who are well positioned and able to engage in advocacy. The department, Koch says, must not only provide the forum — bring groups together — but must also equip members with the skills and tools to engage effectively and to be informed advocates when they meet with legislators.

Ultimately, says Koch, the goal is to invite community representatives in all sectors so that "we're advancing policies that create a just and equitable Pittsburgh area where everyone — regardless of class, race or any identity — can not only survive but thrive."

*Ervin Dyer is a writer, sociologist and senior editor with Pitt Magazine at the University of Pittsburgh.* 







As the Foundation's senior program officer for Economic and Community Development, Jane Downing has extensive knowledge of the devastating impacts of eviction filings on individuals, families and communities. Many landlords will not rent to tenants who have an eviction filing on their credit history, even if the tenant wasn't ultimately evicted. As pandemic-related housing assistance programs near their end, Downing and other affordable housing advocates worry about a future plagued with greater crises. To prevent that, she has been instrumental in convening an eviction prevention group that includes lawmakers, judges, housing authority officials and others who are working to keep people in their homes. MAGE BY JOSHUA FRANZOS

## Policy to Prevent **Eviction**

As COVID-19 closed businesses and caused layoffs, The Pittsburgh Foundation and its partners ramped up their direct lobbying work to extend moratoriums and to secure funding to prevent evictions.

Jane Downing, the Foundation's senior program officer for Economic and Community Development, had worked with public and nonprofit partners for years to find solutions to keep families in their homes. Then, the pandemic threatened to exponentially increase eviction filings, already averaging 13,400 annually in Allegheny County.

Federal and state temporary moratoriums on evictions offered lifelines, and accessing benefits — including millions of federal dollars to help families and landlords — was complicated. Funding provided the opportunity for the partners to test new strategies and develop longer-term policy solutions.

Foundation staff facilitated bi-weekly conversations with grassroots housing advocates, legal specialists, government staff, human services providers, court officials, judges and politicians

Last spring, a Foundation report—"Eviction in Allegheny County"—explored the roots of the problems and offered solutions, such as creating pre-eviction mediation and directing tenants to rental assistance, human services and free legal help.

"What we have been trying to do," Downing says of the report and related efforts, "is to build an eviction-prevention system that encourages more communication and coordination and provides resources and information to both landlords and tenants so that eviction filings don't happen in the first place."

Some recommendations were put into place during the pandemic. Just Mediation Pittsburgh, a nonprofit funded in part by the Foundation, now provides videoconference mediation and access to legal advice for landlords and tenants. And under a temporary order by Allegheny County President Judge Kim Berkeley Clark, the county Department of Human Services was able to help tenants apply for rental assistance at eviction hearings.

They're good first steps in the continued advocacy across the region for pre-filing alternative dispute resolution measures as an important solution.

## ln 2021. in Emergency Rental **Assistance Program funding** has been distributed to

**ALLEGHENY COUNTY** HOUSEHOLDS

which is about 43% of those who applied. ACTION-Housing Inc. oversees distribution. The program stopped accepting applications March 31.\*

## Just **Mediation**

Western Pennsylvania's nonprofit housing advocacy groups stood as a bulwark against eviction last year for tenants economically devastated by pandemic slowdowns and shutdowns.

Some groups facilitate access to COVIDrelated rental and utility assistance, while others, like Just Mediation Pittsburgh, help renters and landlords in western Pennsylvania avoid eviction filings. Just Mediation Pittsburgh has trained a corps of 70 community mediators to resolve landlord-tenant disputes before they escalate to the courtroom. The mediation process is voluntary, confidential and provided at no cost to landlords or tenants.

The results have been remarkable. Just Mediation Pittsburgh intervened in about 220 landlord-tenant cases since December 2020. "Last year, when both the landlord and tenant agreed to mediation, we had a settlement rate of 93%," says Executive Director Aaron Erb. He adds that about 60% of the community mediators identify as Black, Indigenous or People of Color (BIPOC).



Some, including Sharon Jefferson, have personally experienced eviction or housing insecurity. Jefferson, a mother of three, now lives in the eastern suburbs and is a manager at Program to Aid Citizen Enterprise, which helps nonprofits build capacity. Back in the 1990s, when she was a teenage single mother raising her oldest son on her own, housing was a constant source of worry.

Jefferson learned about community mediator training through her church in October of 2020. Since January of 2021, she has facilitated about 30 landlord-tenant disputes and predicts that demand for mediation will only increase. "With the climate of housing instability in Pittsburgh and the moratoria on eviction recently expired, folks are left in quite tenuous situations. Programs like this will, hopefully, keep some people from falling through the cracks."

Just Mediation Pittsburgh also is committed to collaborating with landlords who are open to mediation instead of eviction. It recently launched partnerships with some of the largest low-income housing providers — AHRCO, Allegheny County Housing Authority, Brandywine and Trek Development — which manage thousands of housing units and are among the top eviction filers regionally.



**ACTION-Housing Inc.** 

**Fifth Judicial District** of Pennsylvania, **Allegheny County** 

> **Just Mediation** Pittsburgh

> Neighborhood Legal Services

"Having been there myself, I get the stress. I get the tension. Housing insecurity is one of, if not the most, stressful things – outside of failing health that a person can experience."

—Sharon Jefferson

Sharon Jefferson, a community mediator with Just Mediation Pittsburgh, at the Conflict Lab in Lawrenceville. IMAGE BY NATE SMALLWOOD

# Supporting Organizations

#### **Groups strengthen** communities despite pandemic.

By Deanna Garcia

n year two of the COVID-19 pandemic, there was greater understanding of what communities, people and nonprofit organizations need in order to move from maintaining basic survival to attaining a higher quality of life. Five supporting organizations partner with The Pittsburgh Foundation in grantmaking and programming to fulfill that mission. Last year, The Pittsburgh Promise, Neighborhood Allies, The Forbes Funds, The Charles E. Kaufman Foundation and The Jack G. Buncher Charitable Fund uplifted communities and the organizations that serve them.

Deanna Garcia is a communications officer at The Pittsburgh Foundation.

### • Neighborhood Allies

Neighborhood Allies, established nearly a decade ago to help revitalize neighborhoods by fostering economic opportunity and advancing equity, added a third economic empowerment partner last year to its financial literacy and wealth-building offerings. Fund My Future PGH officially became part of the organization in the spring. The five-year-old program covering 4,000 Allegheny County residents emphasizes the importance of having savings in a bank. To incentivize participants to make regular deposits (no amount is too little) into savings accounts, Fund My Future PGH organizers hold monthly drawings in which one person wins \$1,000 and 29 win \$50 to be directed into savings. Last year, the initiative received a \$50,000 grant from the Benter Foundation. Fund My Future PGH joins the Pittsburgh Financial Empowerment Center and Bank On Allegheny County at Neighborhood Allies as economic opportunity partners. The Empowerment Center provides free, personal financial counseling to any Pittsburgh resident.

## • The Pittsburgh Promise

The Pittsburgh Promise last year surpassed the milestone of funding 10,000 students' posthigh school education access. That translates to \$158 million in financial support awarded since its inception in 2008. Also last year, Promise Coaches were introduced at Carrick, Milliones and Perry high schools. The nine coaches work with students to increase Promise eligibility and participation. In response to the pandemic, which has caused post-secondary enrollments to plummet, The Promise waived attendance and GPA eligibility requirements for the Class of 2021. The Promise, once again, hosted a "drive-in" Signing Day Celebration at the Carnegie Science Center. Before 2020, the annual event, at which students share post-secondary education plans, was held at indoor venues, including Soldiers & Sailors Memorial Hall. The pandemic forced it outdoors as a drive-through event. The Promise also received three \$1 million gifts this year — from Howmet Aerospace, Highmark Wholecare (formerly Gateway Health) and the PPG Foundation.



IMAGE COURTESY OF NEIGHBORHOOD ALLIES

Bank On Allegheny County is part of the national Bank On movement, which organizes coalitions to ensure that everyone has access to reputable and affordable financial resources. As economic fallout from the pandemic continues, Neighborhood Allies remains committed to its mission of creating and maintaining healthy neighborhoods by, among other actions, helping families build individual wealth and providing resources that uplift and empower them.

Fund My Future PGH showcases winners of their monthly \$50 drawings. Beverli was one of the winners in November. She was already saving for her children but decided to open savings accounts in each of their names through Fund My Future PGH. According to research, children with savings accounts in their own names are three times more likely to go to college and four times more likely to graduate. (Last name and children's names withheld at the request of Fund My Future PGH.)

### • The Forbes Funds

Despite all of the difficulties created by the pandemic. The Forbes Funds continued its work to improve the effectiveness of western Pennsylvania nonprofits by connecting them to a wide range of experts offering help in overcoming unprecedented challenges. Forbes Funds staff engaged 30,000 participants in 3,000 Zoom calls. It also launched 10 virtual programs and expanded the work of the Black Equity Coalition, which includes social scientists, bioethicists and other professionals addressing the pandemic's effects on vulnerable populations. The Forbes Funds also sponsored



IMAGE COURTESY OF THE PITTSBURGH PROMISE

workshops featuring the Blood Science Foundation to address the alarming shortage of donated blood. Many of The Forbes Funds' efforts have been tied to the United Nations' Sustainable Development Goals, and staff created a dashboard to show how the region's nonprofits aligned with them. In other health-related work, the organization collaborated with the Cancer Free Economy Network to advance its policy initiatives and provide a blueprint to show communities how to advocate for removal of cancer-causing materials in affordable housing developments.

### • Charles E. Kaufman Foundation

In its mission to increase fundamental research in biology, chemistry and physics at Pennsylvania institutions of higher education, The Charles E. Kaufman Foundation Advisory Board announced \$2.1 million in grants last year. Board members reviewed 121 proposals from early-career and established scientists at 23 colleges and universities. A \$300,000 New Initiatives grant went to researchers who will study the signaling code that tells the stem cells of human embryos when and where to divide, migrate and differentiate. Cracking the code would have broad implications for regenerative medicine, especially in development of replacement human tissues in the laboratory. The researchers on that project include principal investigator Nathan Lord, Ph.D., assistant professor, Department of Computational and Systems Biology at the University of Pittsburgh School of Medicine, and co-principal investigator Dr. Mo Ebrahimkhani, associate professor, Department of Pathology at the Pitt School of Medicine and leader of the Laboratory for Synthetic Biology and Regenerative Medicine at the Pittsburgh Liver Research Center. In total, there were three New Initiatives, five New Investigator and three Integrated Research Education grants awarded. The fund was established in 2005 through a bequest from Charles E. Kaufman. Including last year, the Foundation has awarded 81 grants totaling \$16.6 million since 2013. IMAGES COURTESY OF THE UNIVERSITY OF PITTSBURGH

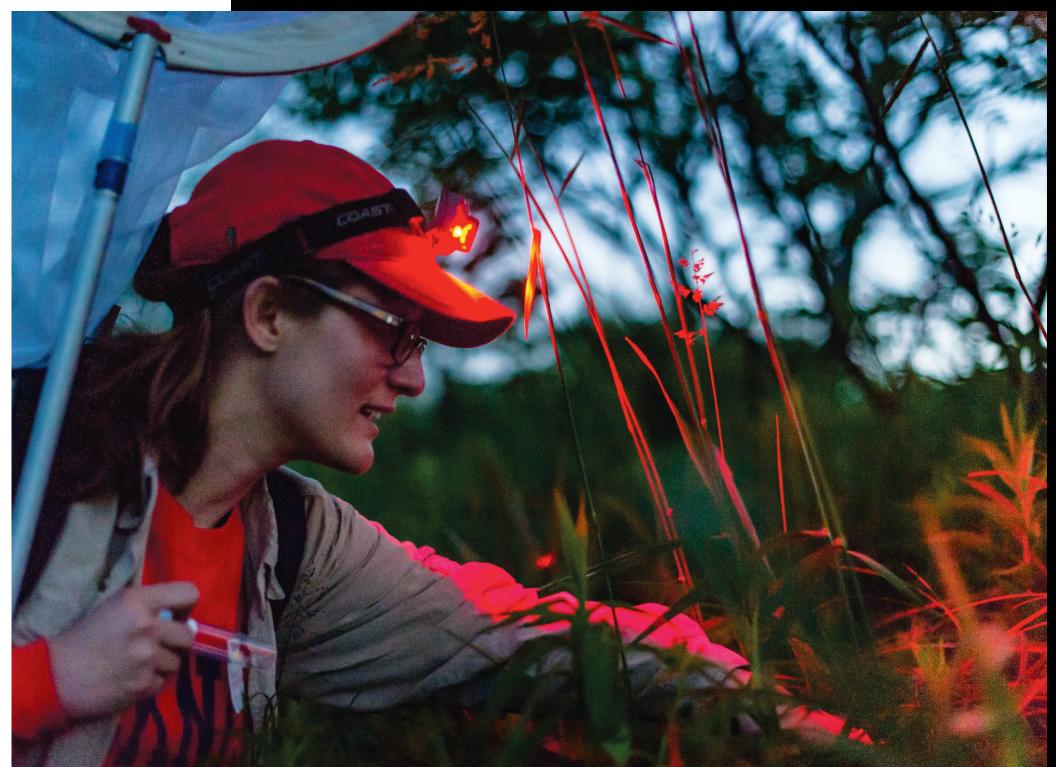


Nathan Lord, Ph.D.



Dr. Mo Ebrahimkhani

With more than 100 applicants for funding from the Charles E. Kaufman Foundation, the scientific advisory board must make tough decisions. Two proposals for 2021 that did not meet criteria for Kaufman funding caught the attention of selection committee members who recommended the applications for funding by The Pittsburgh Foundation. The projects received Pittsburgh Foundation-directed dollars totaling \$195,230. One of those, "Impact of life-stage on immune investment in the common eastern firefly," is exploring how life stage impacts overall resistance and tolerance to bacterial infection in the common eastern firefly. Researchers Moria Chambers, Ph.D., assistant professor of biology, and Sarah Lower (pictured), assistant professor of biology, both at Bucknell University, received \$100,000 for their research. The second grant was awarded to Ryan Trainor, Ph.D., assistant professor of physics at Franklin & Marshall College for "Galaxy growth and feedback traced by Lyman-Alpha Emission," which will use existing data and new observations to address major questions in astronomy.



### • The Jack G. Buncher Charitable Fund

Last year, the Buncher Charitable Fund of The Pittsburgh Foundation awarded a total of \$1.5 million to support Pittsburgh Foundation and Community Foundation of Westmoreland County operations. Since 2007, Buncher has been dedicated to strengthening the two philanthropies and, by extension, the nonprofits they serve. The grants covered technology upgrades, the development of a new strategic plan and production of the annual Critical Needs Alert, a crowd-funding campaign that raises money for organizations that provide life essentials in the community. The Buncher Board also provided support to the Small and Mighty grant-making initiative and new public health efforts. Funding to CFWC will help improve the quality of services provided by nonprofits in Westmoreland County.

# **Our People**

Pittsburgh Foundation board members are outstanding community leaders who represent a broad spectrum of southwestern Pennsylvania government, education, for-profit and nonprofit entities. Their devotion, generosity and expertise ensure that the Foundation will effectively pursue its mission.

Visit pittsburghfoundation.org/bod-current for biographies of all board members and Directors Emeriti.

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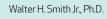
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