

**THE FORBES FUNDS**

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**ANNUAL  
REPORT**

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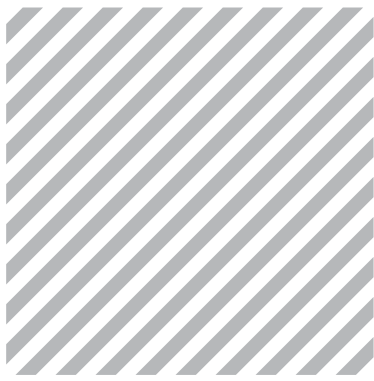
**2019**

**Co-Design Locally,  
Act Regionally,  
Think Globally.**





THE FORBES FUNDS



# Letter

## From the President & CEO

The Forbes Funds (TFF) witnessed tremendous growth in 2019. We brought on new staff, reengaged with communities and community organizations and sought to align a global framework for development with local work that drives our sector.

In 2019, TFF worked with more than 500 nonprofit organizations through more than 1,000 interactions through our four core programs—Management Assistance Grants, Executive in Residence, Greater Pittsburgh Nonprofit Partnership, and Catalytic Community Cohorts. Of particular importance, in December, TFF hosted more than 950 nonprofit leaders and professionals at the biannual GPNP Summit. This number represents nearly half of the current nonprofit organizations in Allegheny County and close to 40% of the 10-county region's nonprofit sector.

It is important to note that TFF has also sought to deepen impact in the nonprofit sector and not just the amount of contacts with nonprofit leaders. For example, through the TFF Needs Assessment, TFF is now able to effectively benchmark the capacity of organizations within four core capacity areas: leadership, adaptive, management and operational. Aggregate data from this tool now informs how, what, and when organizations receive support from TFF and/or our strategic partners and collectively through peer to peer learning and/or cohorts.

Today, TFF is working with local, national and international partners including The City of Pittsburgh, EcoDistricts, The Bateson Institute, Cancer Free Economy Network, Ashoka, Catchafire, The Partnership Network, CCAC, The University of Pittsburgh, District PGH and others to deepen the impact of the nonprofit sector, build capacity within the community, and use a global perspective - specifically the United Nations Sustainable Development Goals and the Social Determinants of Health - to address local challenges.

While 2019 was a strong year for the organization, we recognize that there is still more work to be done to advance the nonprofit sector and prepare nonprofit leaders for sector shocks and stressors that may be on the horizon.

We invite you to learn more about our work and join us as we engage more strategic partners to advance the sector, promote community development and bring global and national resources to our region.

**WITH GRATITUDE,**

Fred Brown,  
President & CEO



# About The Forbes Funds

## Optimizing a Global Framework at Local and Regional Levels

The Forbes Funds mission is to build the capacity of human services and community development nonprofits in Western Pennsylvania through a systems-based approach. Through four core programs, special initiatives and various partnerships, TFF builds the management capacity and impact of community-based nonprofits individually and collectively. We envision a Western Pennsylvania region in which nonprofits and residents thrive. At TFF we think globally. Each of our programs use a dual framework for quantifying our impact in a rigorous and meaningful way. These rubrics—The United Nations Sustainable Development Goals (UNSDG) and known Social Determinants of Health (SDOH) — have been adopted respectively by the City of Pittsburgh and other regional partners as well as governments around the world as a blueprint for a healthy population.

### Dual Framework:



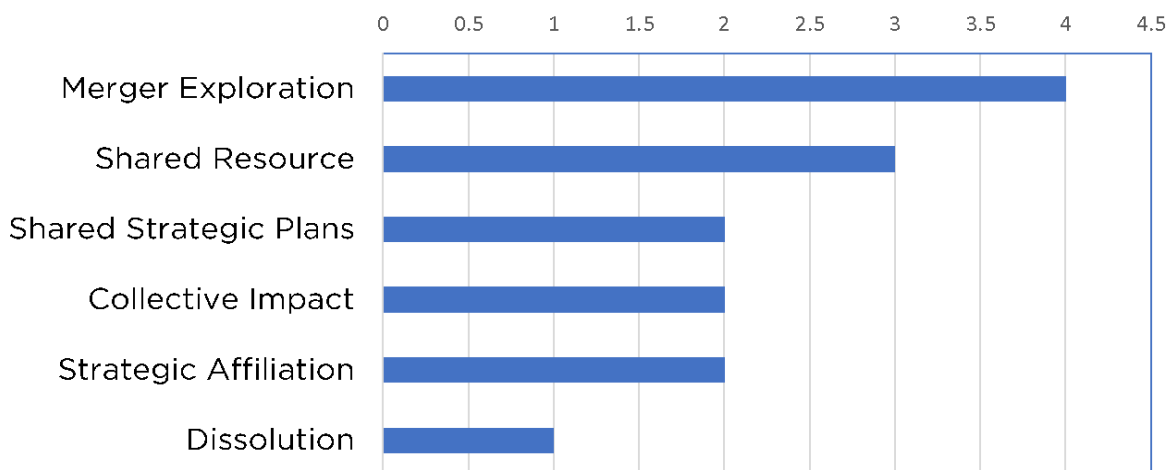
# Our Programs

Spotlights of our Work in Communities

## Management Assistance Grants

We live in an interconnected ecosystem, where the greatest social challenges of our time are larger than any single organization can tackle alone. Our funding model sparks collaboration and strategic alignment as nonprofits address the greatest needs in our region. TFF awards Management Assistance Grants (MAGs) to promote collaboratives of human service and community-based nonprofits building their capacity and increasing the impact of their mission work.

2019 Collaborative MAG Projects



With more organizations supported per grant, The Forbes Funds is reducing duplication across the sector, having a greater impact on the lives of residents in the region and providing support for more organizations. In 2019, MAGS grants support an average of 4 organizations, a significant increase from the previous average of 1.3 organizations per grant in 2016 and 2017.

**2019**  
**QUICK FACTS**  
**ALLEGHENY COUNTY**



**MAGS LEAD PARTNERS WERE SPREAD THROUGHOUT 10 DIFFERENT ZIP CODES IN ALLEGHENY COUNTY**



**FUNDING WENT TO 11 ORGANIZATIONS LOCATED WITHIN THE CITY OF PITTSBURGH**



**ORGANIZATIONS WERE GEOGRAPHICALLY HEADQUARTERED IN 12 NEIGHBORHOODS/MUNICIPALITIES**



**FUNDING ALSO WENT TO THREE ORGANIZATIONS LOCATED OUTSIDE OF THE CITY LIMITS WITHIN ALLEGHENY COUNTY**

# MAGs Spotlight

## Meals on Wheels of Greater Pittsburgh

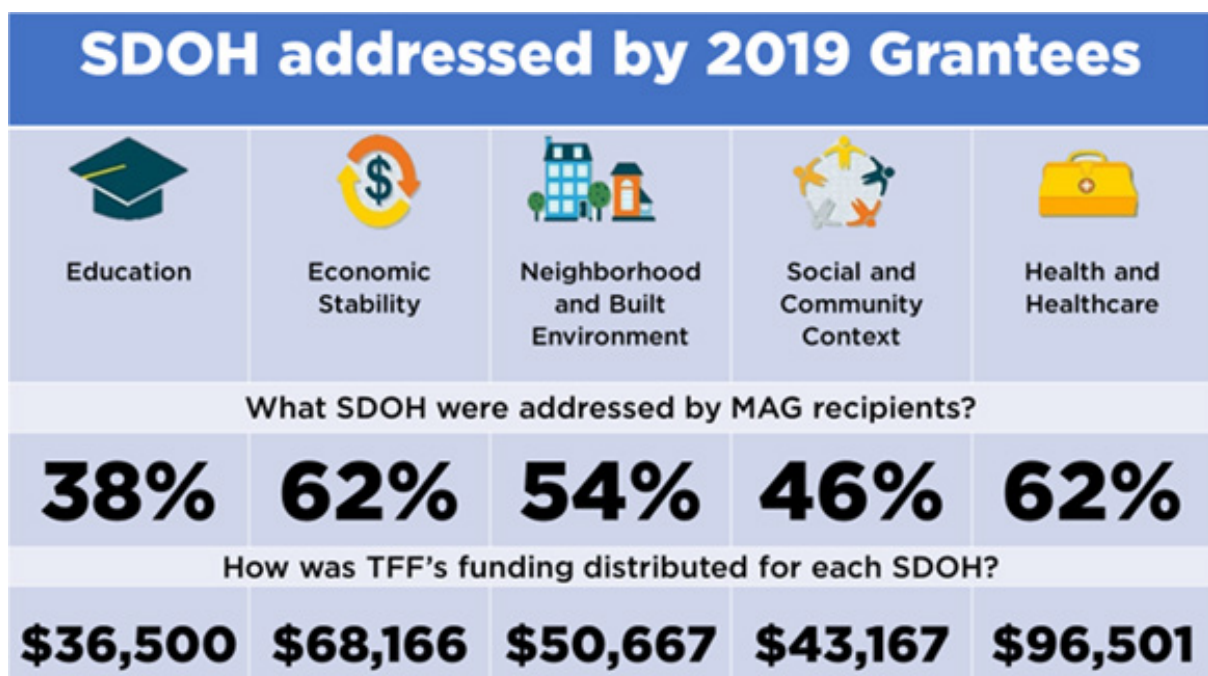
Meals on Wheels of Greater Pittsburgh (MOWGP) has traditionally been viewed as delivery of a commodity. That's changing rapidly with a growing recognition of the role social determinants of health play in addressing health outcomes, utilization and quality of life. Together, MOWGP, Northern Area Multi Service Center (NAMS), LifeSpan, Eastern Area Adult Services, Macedonia FACE, Plum Senior Community Center, Riverview Community Action and Catholic Youth Association applied for a MAGS grant to support the creation of an integrated service delivery model that keeps high risk vulnerable adults safer, healthier, happier and in their own homes.

Currently these seven individual organizations offer service to a limited set of zip codes. However, "purchasers" want a seamless network with broad geographic coverage, including consistent service and quality assurance across multiple providers. MOWGP sought support from TFF to reduce overall operating costs through back office consolidation and joint purchasing by leveraging the strengths of their key partners.

Working together on this grant project, grantees will create a seamless central intake function that makes is easier for consumers and third party purchasers to arrange for service delivery, reduce duplicative back office business processes, adopt a set of common service standards and quality assurance protocols to establish consistent levels of service quality and drive the adoption of best practices, and implement a shared measurement system that will allow MOWGP members to gauge the success of this initiative.

## Spotlight on Grantmaking

To ensure grantmaking aligns with the Social Determinants of Health affecting people in our region, The Forbes Funds partners with the University of Pittsburgh Graduate School of Public Health's Community Research Advisory Board. The partnership codeveloped a Community Research Advisory Board grant review process that evaluates our MAG proposals on how they address social determinants of health, engage the community, encourage collective impact, and utilize strategic partners.





# Our Programs

Spotlights of our Work in Communities

## Executive in Residence

The Executive in Resident (EIR) program encompasses all of The Forbes Funds education and learning programs. EIR includes individual executive coaching and individual or group coaching for board leaders as well as cohort-style peer learning courses.

In 2019, EIR programs served 172 organizations and invested more than \$51,000 in leadership and professional development capacity building services into the region. Beginning in 2020, EIR will partner with the Community College of Allegheny County to provide credit-based certifications.

## Executive in Residence in Action:

As Brookline Teen Outreach moved into the next phase of non-profit growth, Executive Director Caitlin McNulty felt the need for guidance from someone who had a lot of experience in the nonprofit sector that could help her explore the pros and cons of upcoming decisions. TFF paired Caitlin with Executive in Residence Leader, Don Goughler. Through the coaching experience, Caitlin was “empowered to leverage my network to expand partnerships and opportunities, felt better equipped to seek funding that had previously been outside of our reach, expanded our board of directors, and moved closer to a sustainable non-profit model that focuses on our unique approach in the afterschool programming and ways to highlight our success.”



*Caitlin McNulty, Executive Director of Brookline Teen Outreach*

# 2019

## QUICK FACTS

- + 105 EXECUTIVE COACHING PARTICIPANTS
- + 24 BOARD LEADER COACHING PARTICIPANTS
- + 43 COHORT-BASED LEARNING PARTICIPANTS

# EIR Spotlight

The Academy for Cause and Community Engagement Leadership

For the last five years, TFF and The Benter Foundation have provided fundraising and movement building courses for Pittsburgh leaders to improve their ability to generate awareness and support for their cause. The Academy for Cause and Community Engagement Leadership (ACCEL) program enhances the fundraising and marketing capacity of Western Pennsylvania's nonprofit professionals. In 2019, 78 organizations participated in the ACCEL



*2019 ACCEL Course in Action*

courses. In addition to classroom learning, ACCEL participants have the option to participate in roundtable events and salon learning circles that cover topics of interest to the nonprofit community.

TFF offered four ACCEL courses in 2019. The overall sentiment from participants was extremely positive and received emails post-course praising the course. Seventy (70) ACCEL 2019 participants provided post-course survey responses. When asked about implementing coursework into their organization's operations, nearly all participants responded that they were highly likely to do so. One participant noted: "We are planning to execute our first annual giving campaign for the end of this year. I'm working the constituency & supporter model into how we organize our database and I use the messaging framework constantly."

# ACCEL



# Our Programs

Spotlights of our Work in Communities

## The Greater Pittsburgh Nonprofit Partnership

The Greater Pittsburgh Nonprofit Partnership (GPNP) is a growing coalition of nonprofit organizations from a 10-county region in southwestern Pennsylvania. GPNP offers an array of services that provide our members with opportunities to deliver a unified voice on emerging public policies that positions the sector to be a collaborative driver of social change. In 2019, GPNP membership grew to 430 total members. Approximately 52% of GPNP's nonprofit members report having budgets less than \$1 million.

On December 3, 2019, nearly 1,000 of the region's nonprofit, government and private sector professionals convened for the biennial GPNP Summit. With more than 50 sessions and 130 speakers, themes for this year's Summit encompassed cross-sectoral collaboration and strategic partnership. At the Summit, The Forbes Funds communicated alongside the Mayor of the City of Pittsburgh, the Allegheny County Executive, The Pittsburgh Foundation and local UN representatives the region's focus to utilize the UN Sustainable Development Goals to improve quality of life for everyone.

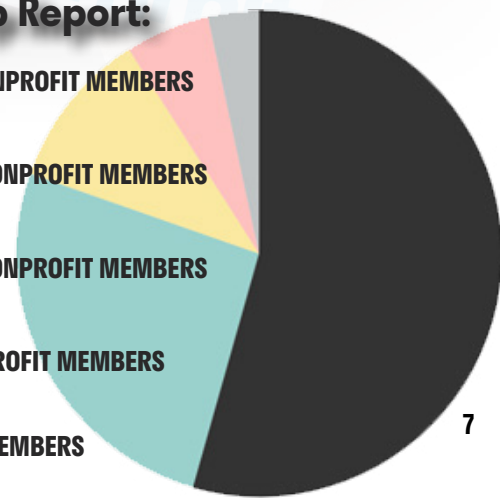
*Hanifa Nakiryowa, Jewish Healthcare Foundation (left) and Bhavini Patel, beamdata (right) | Photo by Brett Allen*

# 2019

## QUICK FACTS

### GPNP Membership Report:

- + 54.4% \$0 - 999K NONPROFIT MEMBERS
- + 25.96% \$1M - 4M NONPROFIT MEMBERS
- + 10.61% \$1M - 4M NONPROFIT MEMBERS
- + 5.64% >\$10M NONPROFIT MEMBERS
- + 3.39% CORPORATE MEMBERS



# GPNP Spotlight

## Catchafire

Beginning in 2019, the GPNP and TFF launched a pilot program of Catchafire, the region's first online tool connecting nonprofits with skilled volunteers to complete capacity-building projects. GPNP members received access to Catchafire as a benefit to its membership and at no additional cost. Throughout the year, almost 5,000 volunteer hours were donated to GPNP member organizations, which generated nearly \$1 million in capacity-building support for nonprofits in southwestern Pennsylvania.

Connecting Champions is a mentoring nonprofit for kids with cancer. Through Catchafire, Connecting Champions completed four pro bono capacity projects saving a total of \$14,631 for the organization.

*"Catchafire has been an incredible asset to our organization. Through Catchafire we have been able to connect with some incredible professional volunteers. We've specifically received help with governance and with developing our first ever annual report. Receiving professional guidance with governance has helped us lay the groundwork for improving our board system and also expanding our board...This will be a key piece for us moving forward and allow us to share important information in a beautiful and concise format with key stakeholders."*

**– Arias Fisher, Connecting Champions**



**WHERE TALENT MEETS PURPOSE**



# Our Programs

Spotlights of our Work in Communities

## Catalytic Communities Cohort

In August 2019, TFF convened a group of stakeholders to kick-off the Catalytic Communities Cohort (C3) initiative. C3 advances the capacity of nonprofit leaders through mentoring, learning cohorts and coaching sessions. These culturally relevant and transferable skills increase the capacity of community-based nonprofit leaders within targeted communities on the margins of the city and surrounding areas. Each community selected is eligible for up to \$100,000 in project funding from TFF.

With an ambitious goal of working in 50 communities over five years, TFF has identified and engaged 10 communities to kick off the cohort. Each community has identified a mentor, host and strategic partners organizations to work with over the next year. In fact, almost all communities have engaged with community partners and received funding from TFF to equip their communities with the knowledge, access and expertise to move their identified C3 work forward. Each place-based C3 program includes cross-sector collaboration with residents working at the micro level of community development and nonprofit, and for-profit organizations working at the meso-level.

## C3 Spotlight

### Braddock C3

The Braddock C3 program aims to create a neighborhood hub of connection, resources, skills building and partnership. Together in partnership, The Braddock Carnegie Library, Greater Valley Community Services and the Braddock Council are working with The Forbes Funds and Google to uplift both businesses and nonprofit organizations in Braddock.

**+** \$173+ INVESTED TO DATE

**+** ESTIMATED \$200K+ IN COMMUNITY VALUE

**+** AVERAGE OF \$14.8K INVESTED PER ORGANIZATION

10 neighborhoods  
40 hours of engagement  
80+ organizations

**+** 17 U.N. SUSTAINABLE DEVELOPMENT GOALS IMPACTED

# 2019

## QUICK FACTS

### Current C3 Communities:

- +** BRADDOCK
- +** BELTZHOVER/ALLENTOWN/KNOXVILLE
- +** CARRICK
- +** HAZELWOOD
- +** HILL DISTRICT
- +** HOMEWOOD
- +** MCKEESPORT
- +** MCKEES ROCKS



# Our Programs

## Special Projects

### EcoDistricts

This year marked the 10th Anniversary for the national EcoDistricts Summit. Hundreds of participants convened in Pittsburgh to share stories and best practices. TFF was integral in promoting and sharing information about the EcoDistricts Summit and the opportunities available for resilient communities around the region to participate.

TFF received funding to support EcoDistricts work in the Beltzhoover/Knoxville area of the city. The \$50,000 grant provided scholarships and \$30,000 in funding for the ongoing work required to implement ecodistrict's development in the resilient community.

In addition to supporting specific neighborhood-based scholarships, TFF received funding from The Pittsburgh Foundation to send another 10 individuals to the conference. These individuals were selected based on neighborhood, existing work in neighborhoods, capacity to drive local change and their ability to start immediately connecting their work to the ecodistrict's framework.

"The EcoDistricts framework aligns with my beliefs. I believe that redevelopment **MUST** be holistic and focus on the people, the Earth, and the built environment all at once. Beyond equity, sustainability, and inclusion. I want to lead my neighborhood and corridors through the EcoDistricts evolution."

*-EcoDistricts participant*



*2019 EcoDistricts Summit, Pittsburgh, PA*

### Warm Data Labs

In partnership with The International Bateson Institute, The Forbes Funds offered Warm Data Lab training in 2019 to 10 participants. Warm data are contextual and relational information about complex systems. In other words, warm data involve transcontextual information about the interrelationships that integrate a complex system, as well as interwoven complex systems. Warm Data Labs are group processes, which illustrate interdependency and generate understandings of systemic patterns for people with no previous exposure to systems theory. Warm Data Labs enable new societal responses to complex challenges.



*Nora Bateson of the International Institute*

Through participation in the program, TFF partners now join an international network of certified Warm Data Lab trainers. They also now have the skills to help their communities further practice their collective ability to discuss and navigate difficult challenges.



# What's Next?

## A Look Forward to 2020 and Beyond



The Forbes Funds looks forward to increasing the capacity of nonprofit professionals and leaders in 2020. Looking forward, TFF has exciting and innovative initiatives planned for the upcoming months.

This year, TFF will continue to expand its grantmaking program by expanding the collaborative project framework to under-resourced organizations and communities. TFF will also continue to invest in strengthening shared organizational infrastructure practices, strategic partnerships and collective impact across the region. Through grant-readiness workshops, the MAGs program will offer support to organizations that are new to our ecosystem.

In 2020, The Forbes Funds will continue to support MAGS recipients and our broader network by investing in the professionals who support nonprofits. The Forbes Funds is developing a Consultants' Roundtable. The Consultants' Roundtable will provide nonprofits with a vetted list a consultants trained in collaborative and collective impact projects, as well as provide consultants with continuous learning opportunities. TFF is also developing a Consultants Roundtable to provide 1) a vetted list of consultants experienced in collaborative and collective impact projects, and 2) continuous learning opportunities for a network of practitioners. TFF will work to partner with local organizations to support the ongoing training of consultants to ensure a diverse and skilled pool of nonprofit consultants. TFF will coordinate quarterly roundtable discussions to troubleshoot, support the application process, and to discuss ongoing training needs.

Over the past year, The Forbes Funds partnered with the Community College of Allegheny County (CCAC) to explore education opportunities for nonprofit professionals. In 2020, The Forbes Funds will launch The Forbes Funds' University (TFFU). In partnership with CCAC, TFFU will offer for credit certifications to current and future nonprofit leaders.

## 2020 Census

GPNP identified the 2020 Census as a key policy priority beginning in 2018. Since January 2019, GPNP has partnered with the Keystone Counts Coalition and the Allegheny County-City of Pittsburgh Complete Count Committee (CCC), statewide and local coalitions, respectively. Early on, Keystone Counts provided informational sessions to nonprofits working with communities of color and immigrant communities to help recruit nonprofits to the coalition and educate GPNP members on the importance of the 2020 Census.

Together with the Bayer Center for Nonprofit Management, GPNP partnered with the Allegheny County-City of Pittsburgh CCC to provide trainings to nonprofits who will act as Census Hubs in 2020 to provide education, engagement, and assistance to residents in historically undercounted areas of the county. Trainings began in November 2019 and will continue into late February 2020. By the end of 2019, approximately 35 nonprofits participated in the trainings to become Census Hubs.



# Partnerships & Funders

At TFF, we know that no single organization can solve today's greatest social and community challenges. In 2019, TFF prioritized local, regional and national partnerships as a framework for collective impact. Together with partners, we increased the reach, depth and impact of our services.

**Advisory Council** - This cross-sectorial group of more than 200 organizations convenes regularly to review the work of TFF, share common concerns and themes within the region, and advise on the needs of the nonprofit sector.

**The Partnership Network** - The Partnership Network is a group of intermediary funders and/or capacity building organizations working to elevate the community and economic development sectors in the Pittsburgh region.

**District PGH** - District PGH is a collaborative of local organizations working to accelerate neighborhood and district-scale sustainable development that promotes climate resilience and equity in the greater Pittsburgh region.

## 2019 PARTNERS & FUNDERS

The Forbes Funds would like to thank our funders for your generous support of our work to BNY Mellon, BNY Mellon Foundation, Garfield Foundation, Heinz Endowments, The Benter Foundation, The Buhl Foundation, The Hillman Foundation and The Pittsburgh Foundation.

### Program Funders:

- Allegheny Foundation
- BNY Mellon Foundation\*
- Garfield Foundation\*
- Hillman Foundation\*
- Jefferson Regional Foundation\*
- Neighborhood Allies
- Pennsylvania Voice - 2020 Census
- Poise Foundation
- RK Mellon Foundation
- The Benter Foundation\*
- The Buhl Foundation\*
- The Community Foundation of Westmoreland County\*
- The Fine Foundation\*
- The George H., Lillian, and Mary S. Campbell Foundation
- The Grable Foundation\*
- The Heinz Endowments\*
- The Pittsburgh Foundation\*

### GPNP Summit Supporters:

- Baker-Tilley Virchow Krause LLP
- Bayer Center
- Bookminders Pittsburgh Inc
- Bridgeway Capital, Inc.
- Cancer Free Economy Network (CFEN)
- Carnegie Mellon - Heinz College
- Catchafire

- CCAC Educational Foundation
- Ceeva, Inc.
- Clean Production, Inc.
- Cohen & Grigsby, P.C.
- Computer Troubleshooters
- Cyber Crucible, Inc
- Eckert, Seamans Charitable Foundation
- Enkompass Technology Solutions
- Enscoe Long Insurance Group LLC
- First National Bank of Pennsylvania
- H2RCPA (Horovitz, Rudoy & Roteman)
- HBK
- Highmark
- Image Box Productions Inc.
- Indiana University of Pennsylvania
- Maher Duessel
- McCauley Ministries
- Merrill Lynch
- Nancy Rackoff
- Nonprofitall LLC
- PACE Pittsburgh
- Penn State
- Pittsburgh Child Guidance Foundation

- Procopia LLC
- Propel Schools Foundation
- ProVerify
- RUH Consulting
- Salsa Labs, Inc.
- Schneider Downs & Co, Inc
- Shear Capital Group, LLC
- Sisterson
- Saint Francis University
- The Birmingham Foundation
- The Grantmakers of Western Pennsylvania
- The United Way of Southwestern Pennsylvania
- The WI Patterson Charitable Fund
- Travelers
- Union Bridge Capital (Cantilever)
- University of Pittsburgh
- UPMC
- Vista Point
- Women and Girls Foundation
- Your CFO of Pittsburgh

\*Also 2019 Summit Supporters



# Financials

## 2018/2019 Consolidated Financial Statements

### 2019 Audited

**ASSETS** **\$9,406,238**

Cash: \$2,290,466  
Corporate Operating Reserve: \$541,309  
Endowment: \$6,647,143  
Other: \$27,320

**LIABILITIES** **\$623,829**

Grants Payable: \$280,169  
Accrued Pension Liability: \$195,064  
Accounts Payable: \$148,595

**NET ASSETS** **\$8,782,409****REVENUE** **\$3,130,672**

Contributions: \$1,503,083  
Sponsorships/Registrations: \$251,848  
Dues: \$116,200  
Investment Income: \$1,248,338  
Other: \$11,203

**EXPENSES** **\$2,251,776**

Grants and Program Services: \$1,798,886  
Management and General: \$419,718  
Investment Management Fees: \$33,172

**NET INCOME** **\$878,896**

### 2018 Audited

**ASSETS** **\$8,550,482**

Cash: \$2,038,451  
Corporate Operating Reserve: \$421,564  
Endowment: \$5,869,208  
Other: \$221,259

**LIABILITIES** **\$646,969**

Grants Payable: \$367,297  
Accrued Pension Liability: \$163,212  
Accounts Payable: \$116,460

**NET ASSETS** **\$7,903,513****REVENUE** **\$868,902**

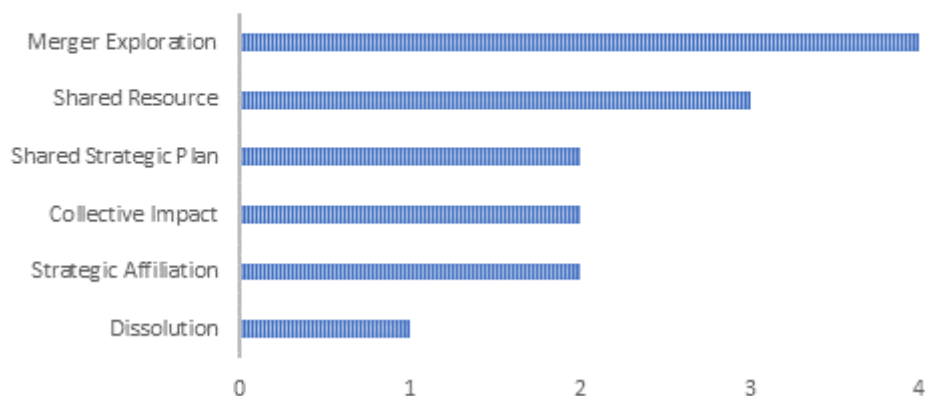
Contributions: \$884,705  
Sponsorships/Registrations: \$33,278  
Dues: \$73,000  
Investment Income (Loss): \$(122,334)  
Other: \$253

**EXPENSES** **\$2,270,670**

Grants and Program Services: \$1,616,091  
Management and General: \$621,620  
Investment Management Fees: \$32,959

**NET INCOME (DEFICIT)** **\$(1,401,768)**

## 2019 COLLABORATIVE MAG PROJECTS



The Forbes Funds  
5 PPG PLACE, SUITE 250  
PITTSBURGH, PA  
15222

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



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NEIGHBORHOOD **ALLIES**

