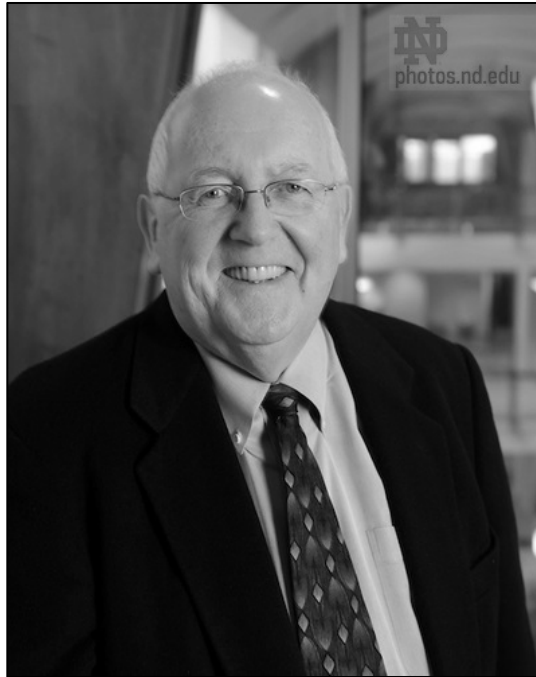# THE TROPMAN REPORT

2024

THE FORBES FUNDS

In loving memory of Thomas J. Harvey, a beacon of hope and inspiration in higher education and the wider nonprofit community, especially as a cherished friend of the Forbes Funds. Thomas's tireless dedication to community development, his unwavering commitment to making a difference, and his profound wisdom touched the lives of many. His passion for social change and generosity of spirit made him a true advocate for positive transformation. As we mourn his loss, let us also celebrate the incredible legacy he leaves behind.

Image courtesy of the University of Notre Dame.

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Letter from John Tropman

When I ask nonprofit executives about their most serious problems, the "lack of financial resources" often comes up as their top concern. And when my dad and I talked about issues in the sector, he certainly felt that was a critical problem. While he did not put it precisely this way, he understood that our country had offloaded a "safety net" into the private sector without providing the protective legislation that produced a healthy supply of social problems nor the resources to deal with them.

But he also frequently mentioned the lack of leadership training for nonprofit managerial and executive personnel—Schools of Social Work were heavily focused on training for individual work, with a bit of community organization thrown in—and a lack of consultative systems for social benefit organization in honing and sharpening their organizational culture and structure. It was a familiar story. There was never enough money to provide the services that were needed. How could agencies be expected to invest in executive education and training? In today's parlance, there is no less research on sector issues aimed at sector improvement. Our sector was, and is, a lot like asking teachers to buy their own school supplies. So today, I tell my students to place professional development in their budget and then ask their agencies for a trifecta: the employee pays a third, the agency pays a third, and they collectively fundraise for a third. Constant improvement requires constant engagement.

The establishment of the Forbes Funds was a significant step towards addressing the challenges faced by the nonprofit sector. It provided a centralized platform for the allocation of funds for development and research programs, as well as organizational consultation. This was a crucial intervention, considering the prevalent issues of financial scarcity and the lack of leadership training in the sector. The Forbes Funds' impact extends beyond Pittsburgh and Allegheny County, potentially benefiting a much wider audience.

And it has succeeded in that task for forty years. Congratulations! How has that happened? It has happened through the extraordinary leadership of each of the presidents. As one analyzes the legacy of the presidents, one is struck by the constancy of purpose (ends) with the flexibility of approach (means). As the environment changes, they not only collect the dots, but also connect them. This leads to innovative initiatives to meet the changing but constant landscape needs.

I invite you to consider their work to be a stimulant to your development and those within your agency. We must consider not only what is down the street but also what is around the corner. We must pay attention to what we know but are not acting upon. It is the "What about…?" question, the "elephant in the room," a "defensive routine." We must understand as well that there are events in the pipeline that we do not know about, events that we do not know that we do not know about, that which could never conceivably happen but does happen anyway, the "What if…?" question.

So, it is my pleasure to congratulate the Forbes Funds, its supporters, and its participants on their achievement of being a leader in the country in enhancing organizational capacity and performance. At the University of Michigan, I would conclude by saying "Go Blue." Now I say "Go Black and Gold."

John Tropman

Reflections on the Forbes Funds

JIM DENOVA

I look at my time at the Forbes Fund in the context of the times in which I assumed the position of executive director. I came in 1996 as the second executive director. My charge was to build a center of technical assistance that answered the evolving capacity-building challenges that small human service agencies were facing. It should be noted that Forbes was only one fund in those days, and I will be referring to it as "Forbes" going forward.

The last decade of the twentieth century was a time of evolving complexities in what it took to run a thriving nonprofit organization. This was not just a Pittsburgh phenomenon; it was a national trend. Nonprofit management assistance centers were popping up across the country as independent agencies or housed in universities. Institutions of higher education began offering courses of study in nonprofit management, administration, and governance. The Alliance for Nonprofit Management was formed as a national association of such agencies and people committed to improving organizational effectiveness.

Nonprofit management was becoming more sophisticated, and the demand for more specialized management assistance services was apparent. The bottom line was the recognition that the generic strategic plan was no longer sufficient to meet the needs of individual agencies or clusters of agencies working in the same space. This was a time when we started to see business plans (focusing on finance) replacing strategic plans.

Through a collaborative planning process that included private foundations, government funders, and the United Way, Forbes recruited a portfolio of consultants with highly specific skills. This portfolio included people and organizations with expertise in financial management, technology, fundraising, board development, and, most timely, mergers and strategic affiliations. When approached for assistance, Forbes would conduct an organizational assessment, often recommending teams of specialists to work with the client agency or group of agencies. The idea of a technical assistance team was particularly relevant to the call for mergers and affiliations. In one case, Forbes helped a private school and a mental health agency form a new corporation that could share licenses and separate funding streams. This called for a team of MIS, finance, and merger experts to blend public funding in a more family-centered way.

It was not just a time of new collaborations among service agencies. It was a time of collaborative funding among foundations. For Forbes, this spoke to complementary roles: Forbes funded the infrastructure, and the other foundations funded the programs that the infrastructure supported. To launch this complementary model of grantmaking, a group of major family foundations generously contributed to a pooled fund that Forbes used to pay for the capacity building necessary to manage large program grants. These grants were made in tandem. A case in point was the availability of a large housing grant to a small, grassroots, minority-run agency. Forbes helped build the financial management system tailored to this housing grant.

 Forbes was neutral regarding the type of programs our partnering foundations supported. These programs ranged from family services, housing, and reentry from the criminal justice system to alternative education and workforce training. In effect, Forbes was the plumber of the philanthropic community.

I offer this piece of history because the evolution in nonprofit management I saw in the late 1990s was marked by a new era of collegiality and collaboration. Collegiality itself is not new, but history has demonstrated that it takes different forms at different times.

Forbes has consistently evolved in response to the changing needs of the nonprofit sector. Each chapter and each new leader contributed new insights and talents to the role Forbes plays in the greater Pittsburgh nonprofit world. I look back on the late 1990s as an important time of forming partnerships and creating integrated systems out of the abundant number of agencies and philanthropies with which our town is blessed. Back then, we saw a lot of redundancy in a sector composed of similar but small nonprofits. This sparked our interest in mergers, but not the kind of merger that calls to mind the image of "hostile takeover." Forbes and the broader foundation community looked for ways to assure essential services in the most needed communities through affiliations that did not always mean merger, but sometimes did. To borrow from Frank Lloyd Wright's mentor, Louis Sullivan, our approach was to let form follow function.

As we reassemble our lives and institutions in the wake of the Covid epidemic, I see a reflection of the 1990s in the way nonprofits and nonprofit leaders are creating new cohorts to exchange ideas and share resources, new models of consolidated back-office support, and new approaches to personal collegial leadership. We saw the Children's Museum create a host agency incubator for small arts organizations on the brink of closing during the Covid shut down, and we saw the McCune Foundation create cohort-based capitalization initiatives that raise the performance and capacity of systems, not just individual agencies. There are many such examples out there. I cite these two as illustrative of new and creative forms of collegiality.

And lastly, I think that, going forward, nonprofit leadership will not be marked by individual traits in isolation, but by how leaders organize teams of much smarter specialists. We are seeing the era of the leadership team, where the CEO is not out in front of the team but facilitates the most effective combination of talents to the greatest benefit of the nonprofit sector.

Like the late 1990s, this is not the time to go it alone.

KEVIN KEARNS

When I was asked by Burr Wishart, who was then president of the Pittsburgh Foundation, to serve as president of the Forbes Funds, then known as the William Copeland Fund, I was fully ensconced as a faculty member in Pitt's Graduate School of Public and International Affairs. It is noteworthy that then-provost Jim Maher and then-dean Kerry Ban graciously agreed to a two-year leave of absence to serve the Forbes Funds on an interim basis. Pitt's decision to grant this extended leave of absence was unprecedented and is merely one many examples of the University of Pittsburgh's historic and ongoing commitment to serving our community.

While I had taught about nonprofit organizations for many years, I was truly a neophyte in the world of philanthropy. My predecessor, Jim Denova, had done a superb job of firmly establishing the Forbes Funds as a recognized leader in nonprofit capacity building and I was keenly aware that I had big shoes to fill. Thus, I spent the first six weeks seeking input from funders, community leaders, nonprofit executives, partner organizations, and of course the Forbes Funds advisory board. Gradually a vision and three-pronged strategy began to take shape:

1. The Forbes Funds would continue to provide capacity-building grants to nonprofit organizations, focusing our attention on projects with a high return on investment. Many of these investments would promote and facilitate collaboration among two or more nonprofits, a precedent set by Jim Devona and other previous leaders of the Forbes Funds. We would

   also fund initiatives to help nonprofits think strategically with respect to their management and governance.

2. While the Forbes Funds would continue to assist individual nonprofits that were confronting immediate challenges and even crises, we would devote much more time and energy to identifying and analyzing emerging trends and issues that would likely impact the nonprofit sector as a whole. The goal was to position the Forbes Funds as a thought-leader on emerging issues, being catalyst for or even beta-testing new approaches and learning from both our successes and mistakes.

3. This would require the Forbes Funds to engage more directly and strategically in applied research and to broaden our attention to include regional, national, and even some international developments. Also, we would enlist the participation of experts who were doing cutting-edge research at universities, think tanks, and national consulting firms as well as policy makers and their advisors at all levels of government: local, state, and national.

A notable initiative, arising from this vision, was the creation of the Tropman Reports, which were designed to be non-technical and widely accessible publications to periodically disseminate data and research on emerging trends in the nonprofit sector. These reports would also provide evidence-based advice based on the experiences of highly successful nonprofits here and elsewhere. During my tenure we published seven Tropman Reports on a variety of topics.

For example, one emerging issue at that time concerned the role, impact, and capacity of faith-based nonprofits. President George W. Bush had just created, via executive order, the White House Office of Faith-Based and Community Initiatives. National and even international attention began to focus more on faith-based nonprofits, but little data was available, especially locally, on this important sub-sector. Our research on this topic appeared not only in an issue of the Tropman Report but also was published by a leading international research journal thus giving the Forbes Funds a new level of visibility.

We produced Tropman Reports on other emerging issues such as nonprofit commercialism and entrepreneurship, a new approach to strategic planning, emerging technologies to assist in recruitment and hiring of employees, and the looming threat of a leadership vacuum in the nonprofit sector.

Perhaps the most impactful action during my tenure as president was the hiring of Gregg Behr. Gregg subsequently elevated even higher the national and international visibility of the Forbes Funds. During our time together, we established the Wishart Award for Excellence in Nonprofit Management, using as a template the national Baldridge Award given to selected businesses.

Many of our initiatives succeeded, some failed, and others never even took flight. But in every instance, we learned from our experiences and tried to share these lessons with others. My own learning curve, both professionally and personally, was almost vertical during those two years. The term "drinking from a firehose" took on new meaning for me. Indeed, the "teacher," a role to which I was accustomed at the University of Pittsburgh, became the "student." Among my most valued teachers were nonprofit executives, staff, and volunteers. Whenever possible I met with them in their own facilities and neighborhoods rather than in my office. They opened their doors and generously shared with me their accumulated experiences and wisdom. I am eternally grateful to all who patiently counseled and educated me and for the priceless opportunity to work in an extraordinary organization with a rich history and promising future.

Looking ahead, a few challenges and opportunities are here or looming on the horizon. For instance, nonprofits need to do a better job of practicing what they preach with respect to diversity, equity, and inclusion among the executive ranks and on their governing boards. People of color and other minorities are underrepresented in top leadership positions, especially in large organizations, and there is evidence of persisting inequities in salaries. Securing sufficient funding continues to be a

challenge and likely will remain so for the foreseeable future. Foundations, donors, and other supporters need to give more consideration to providing general operating support. And, of course, restoring "civil" in civil society has emerged as possibly the most daunting challenge in modern society. Extremist and hateful philosophies are amplified on social media and legitimized by political candidates and technologies, such as artificial intelligence, are depersonalizing human interaction on many levels. How the nonprofit sector addresses these problems is well beyond my meager capabilities, but I do believe that organizations like the Forbes Funds have a role to play. Pittsburgh is fortunate to have an organization devoted solely to building the capacity of nonprofit organizations.

GREG BEHR

I was entrusted to lead the Forbes Funds from 2002 until 2006. I succeeded Dr. Kevin Kearns, who had put in place a refreshed, three-fold agenda to serve Pittsburgh's social-services sector: management capacity building, community-based research, and leadership training and support. With these foci, we rebranded "The Forbes Fund" as "The Forbes Funds" and, in so doing, also honored the three people who had been instrumental during Forbes' first quarter century: Bill Copeland (the Copeland Fund for Nonprofit Management), Elmer Tropman (the Tropman Fund for Nonprofit Research), and Burr Wishart (the Wishart Fund for Nonprofit Leadership). These three funds made up the Forbes Funds.

During my five years at the helm of the Forbes Funds, I worked alongside some extraordinarily dedicated trustees, notably Estelle Comay and John Harmon, and was lucky enough to assemble an all-star team whose own leadership impacted the Pittsburgh region for decades to follow: for example, Aradhna Oliphant, Diana Bucco, and Sam Reiman). Together, we were deliberate and intentional about realizing the three-part charge for the Forbes Funds, and we approached it with what might be called musicality.

There was a quarterly rhythm to the management grantmaking by which we responded as best and promptly we could to the management problems (and opportunities) facing nonprofits. Noticing patterns among agencies' challenges, we also supported cohorts of organizations that worked closely together on common solutions. There was a rhythm, too, to the cycle of research and publishing, providing data and content for such annual events as a research conference and a sector-wide summit. And this same rhythm extended to celebrations of nonprofit management excellence, with annual presentations of the Wishart Award and Shapira Medal. All this rhythm yielded something critical, and perhaps a bit unplanned: social (not merely professional) connections among nonprofit executives and other staff dedicated to improving the public welfare in our region.

It was these connections that set the stage for building a sensibility among Pittsburgh's nonprofit leadership that the nonprofit sector could be a collective and powerful thing. That collective power is something that leadership had not yet realized. Looking back now to the early 2000s, we could see, for example, a nonprofit sector maligned in local media coverage as exacerbating the city's dire finances without any response(s) from the "nonprofit sector" about its robust financial and social contributions to the city's well-being. For example, while we could see efforts by philanthropic foundations to develop the Pittsburgh Public Service Fund, the P32 Regional Visioning initiative, and the Save Our Summer campaign, we didn't see complementary, collective work by the "nonprofit sector" generally to participate broadly in, or even initiate, regional leadership. There was not yet a spot at the proverbial table for "the nonprofit sector." And so that's what prompted us at the Forbes Funds to launch what is known today as the GPNP, or the Greater Pittsburgh Nonprofit Partnership, to create a presence for the nonprofit sector that might one day assume a collective force that's an integral part of solving the region's problems and fueling its opportunities.

The GPNP represents the movement-building still necessary today across our region's nonprofit sector. Civil society needs, and deserves, an industry-wide voice poised to convene press events, mobilize advocates, produce data, elevate veteran and fresh leadership, and generally press for our common good. The GPNP gives voice to the "good trouble" that stirs public imagination about how, together, we will realize better tomorrows. And it's together—bridging the good people who give vibrancy to our community centers, service agencies, houses of worship, parks, learning sites, and all civic organizations that compose our nonprofit sector—by which the GPNP epitomizes the good will at core of western Pennsylvanians. That goodness can be found all across Mister Rogers' real-life neighborhoods dotting every corner of this region. There's a musicality to our beautywood. And that musicality, that good will, is our moral compass, now and always.

DIANA BUCCO

The great recession of 2009 was a pivotal moment for the nonprofit sector. For decades prior, there was a "social contract" among government and the social sector. Nonprofits would focus on mission by meeting the needs of our most vulnerable and providing much-needed support while the government would issue contracts to provide the services. That relationship was gradually changing as government funding continued to contract, leaving the responsibility of caring for our most vulnerable in the hands of the nonprofit sector and the burden of funding the cost of service on the lap of nonprofit leaders. The Forbes Funds was founded in 1982 during a time of crisis providing short-term loans to support agencies and to build their capacity to adapt in an ever-changing environment. In 2009, we found ourselves once again meeting that challenge by refocusing our core priorities of management assistance grants, sector leadership, and applied research.

Management assistance grants into the early 2000s were primarily focused on strategic planning, marketing, and evaluation. By 2010 government contracts were held up by the lack of an approved state budget for as long as nine months, and when finally awarded the amounts had changed significantly. As nonprofits continued to deliver services on the belief that government would fulfill the commitments, they continued to deplete reserves, draw down on lines of credit (if they had it) or borrow funds. Many nonprofits lacked the infrastructure to respond to this evolving crisis, and by the time they came to the Forbes Funds it was too late to offer a turnaround solution. Rather, Forbes facilitated the need to explore mergers, acquisitions, or dissolutions. It became necessary to introduce business principles to the sector on a much more robust level.

Boards and Directors had to shift from focusing on programming to the business of the nonprofit. Historically, a benefactor could provide an infusion of funding if an agency had a challenge, but the crisis was too great for philanthropists and foundations to provide the much-needed infusion of capital. As a result, we had to introduce a new set of tools into the nonprofit sector: forecasting, scenario planning, and rolling cash flow analysis to mention a few. Nonprofits had to begin hiring Chief Financial Officers capable of complex analysis rather than bookkeepers who were just paying the bills.

Similarly, nonprofits needed to diversify revenue. Pre-recession, a government contract was 90% of an agency's funding. We began to introduce fundraising best practices and discussing funding pie charts, making the case that a single funding source should be limited to 30% of annual income. The best models were a mix of public support, fee for service or earned income, fundraisers, and individual giving. The Forbes Funds hosted cohort programs with teams of staff and board that would meet regularly to address fundraising and budget structure of organizations. These continue to be the building blocks for our sector.

As the sector assumed both the services and financial needs of our most vulnerable, they also began to realize that the "charitable sector" was no longer secondary to government and business but now the "third leg of the stool." There is interdependency among the private, public, and nonprofit sectors and, through our applied research, we wanted to quantify it. During this time, we commissioned an economic impact study of the nonprofit sector and were able to demonstrate that it provided more than $6 billion worth of support to the region. Armed with growing data about the impact of the sector, we began to train our nonprofits on how to communicate differently about our work and its impact.

Simultaneously, the Forbes Funds launched the Greater Pittsburgh Nonprofit Partnership (GPNP) with the mission of creating a unified voice for the sector. The GPNP was our sector leadership agenda of that season, designed to create a voice but, equally as important, to build the relationships that would make it easier for nonprofits to be more forthcoming with their management capacity needs. Coming forward with a problem is never easy, the shared work of the GPNP facilitated relationships built through trust and respect that allowed leaders to grow and evolve in a safe environment.

Through our sector leadership agenda, we added another set of tools into the nonprofit toolbox that focused on how to communicate with elected officials and prospective donors about the important role of the sector. We provided the language that detailed the sector's role as the "third leg of the stool" and about how all three sectors needed to work collaboratively to solve society's most complex problems. On a more basic level, we ran workshops that explained a nonprofit's legal right to advocate and hosted elected officials' visits so that nonprofit executives would become comfortable with the process. In addition to changing the paradigm, we created a space for nonprofit leaders to build a network of support among each other.

Each leader of the Forbes Funds is privileged to serve the nonprofit sector by providing management assistance support, applied research, and sector leadership that is responsive to the times. As we introduced new tools to further strengthen the field, many feared that the sector would lose its "heart" if becoming more business minded, but were quickly reminded then, and today, that our leaders never lose sight of their core mission and commitment to the common good.

Covid-19 once again propelled the nonprofit sector into unchartered waters. Government financing was key to sustaining the sector as it pivoted to meet basic needs during the pandemic. As a society we are faced with significant challenges post-Covid, including significant learning loss among students, mental and behavioral health crisis, rising homelessness, escalating gun violence, and suicide to mention a few. These are all complicated issues that will require creative solutions and cooperation. While in the past we emphasized cross-sector cooperation, we will need to go further, engaging the entire community in problem solving.

I am currently the President of the Buhl Foundation and was charged with re-imaging the Foundation for the 21st Century. We have developed a comprehensive, resident-driven approach to grant-making, dedicating ourselves to embedded philanthropy. Through this approach, we have aspired to build deep, meaningful relationships with residents with the goal of ensuring that everyone has equal access to the benefits of a changing economy. Drawing on my experiences at the Forbes Funds, the Buhl Foundation provides the operating resources to achieve impact while building the capacity of its leader to run a high performing organization. In this role, the foundation and grantees work collectively with the residents, public and private partners to work toward solutions that inhibit behavioral and systemic change.

During my tenure at the Forbes Funds, I learned that the most unlikely partners will come together around a shared vision and work collectively to achieve outcomes for the greater good. I will continue to approach philanthropy with the same commitment. The unique role of the Forbes Funds is once again being called upon to bring together diverse partners to address our community's most

pressing issues. The Forbes Funds grew out of the need to guide the nonprofit sector through crisis and, I am certain, will continue to respond to the call.

KATE DEWEY

The 1960s were a turning point for human services that forever changed our country. According to Michael Reisch, "After a generation of inward looking conservatism, significant numbers of American social workers revived the radical tradition of the profession… New social movements, particularly the civil rights movement, the anti-war movement, and second-wave feminism, and the efforts of activists…inspired new approaches to advocacy, research, practice, and education. Inside and outside professional organizations and social service agencies, social workers began to advocate for progressive policies, the use of more expansive and more democratic practice frameworks, and the inclusion of content on race, gender, class, and sexuality in social work education. For a brief period, it appeared that a major professional transformation appeared possible, even inevitable."

The events of the 1960s produced some important changes in social work practice and education. To implement the approach, nonprofit organizations needed to support the plan. Unfortunately, they resisted and kept their agencies in place. Why? President Lyndon B. Johnson introduced massive amounts of federal funding like the Economic Opportunity Act, the Civil Rights Act, the Older Americans Act, Medicare, and Medicaid. He launched countless new programs to address poverty, racial inequality, health, education, housing, urban decay, and other urgent social problems.

Today funders want a significant social change from charities and an entrepreneurial approach to doing whatever it takes to get the biggest impact at the lowest cost in the shortest period: the Covid-19 Pandemic and its aftermath has been a perfect time for nonprofits to consider a new construct. Unfortunately, agencies' behavior has not changed.

According to Nonprofit Impact Matters, there are 131,459 human service organizations in the United States. Human service organizations employ three million people, earn more than $191 billion in revenue annually, and have assets of $284 billion. And at least 7 – 10% are underwater. Ninety-seven percent of nonprofits have budgets of less than $5 million annually, 92% operate with less than $1 million a year, and 88% spend less than $500,000 annually for their work. The "typical" nonprofit is community-based, serving local needs. Is this the time for human service agencies to acknowledge the impediments and build a new service framework? That effort will not provide a speedy resolution. This is not suggesting that small nonprofits need to close their doors or be absorbed by larger agencies. The question is whether smaller nonprofits become more agile and can be a resource to larger nonprofits. Is it also time for nonprofits-particularly with operating budgets of $5 million or less to revisit their value and sustainability. Executive Directors and Boards should ask themselves:

- Have we made decisions based on our self-interests rather than what is in the best interests of our clients or staff?
- Have we been honest about the strengths and weaknesses of the quality of our services based on data, financial health, the capability of staff to perform their job, and staff turnover?
- How do our salaries and benefits compare to the pay scales of other agencies, Boards, and Executive Directors?
- Where do we rank as a service provider amongst our peers?
- What are our financial reserves? How long could we exist if no new revenue came in?
- Would we recommend a family member come to the agency for service?

Depending on your answers, you can decide your next step and build an action plan to guide you.

LISA SCHROEDER

In 1982, the administration of President Ronald Regan, one year into his term, instituted drastic cuts to human services agencies that made up the safety net for people in need. The cuts led to a funding crisis for those nonprofits that were providing life essentials to southwestern Pennsylvania residents. The Pittsburgh Foundation and the Heinz Endowments recognized it as a humanitarian emergency and responded with resources and an organizational plan to get nonprofits back on their feet.

If the philanthropic, business, and civic leaders spearheading that effort through a new organization, the Forbes Funds, were told then that 41 years into the future it would still be providing critically important services to the nonprofit community, they would have been shocked.

The Forbes Funds was envisioned to be a one-hit wonder. It was created to function as a temporary patch to the human services safety net that had been punctured by the Reagan Administration's move to cut or reduce billions of dollars in funding to multiple domestic welfare programs, including Social Security, Medicaid, Food Stamps, education, and job training programs.

Forbes served as a lifeline for hundreds of nonprofits assisting residents who were struggling economically during that period. It did such an effective job under the leadership of founding director Elmer Tropman that the organization received year-after-year support to continue addressing year-after-year challenges and opportunities.

From 2000 to 2015, I was a devoted member of Pittsburgh's nonprofit community through my leadership of Riverlife, the public-private partnership guiding redevelopment of Pittsburgh's riverfronts. I was able to witness firsthand the enormous contributions of Forbes staff and board in helping nonprofits facing management or financial troubles to survive and also assist the sector as a whole to thrive for the betterment of the entire region.

More than two decades later, as head of the Pittsburgh Foundation, I now have an inside organizational view of how Forbes operates. It is one of our supporting organizations, meaning that we support it in its mission because it helps to advance ours. Forbes' calling is to ensure the well-being of our region by helping the nonprofit sector build management capacity and increase the impact of all the individual organizations' missions.

That longstanding relationship was front of mind for me throughout the wonderful 40th Anniversary Celebration at the Heinz History Center on November 17, 2022. I moderated a panel session featuring the Forbes Funds' President Fred Brown and the previous chief executives: Jim Denova (1996 – 2000), Kevin Kearns (2000 – 2002), Gregg Behr (2002 – 2006), Diana Bucco (2006 – 2013), and Kate Dewey (2013 – 2018). Everyone in the packed ballroom that night deeply regretted that a bout with Covid-19 prevented John Tropman, son of the Forbes Funds' late founding executive director, Elmer Tropman, from representing his father on the panel.

The leaders recounting the highlights of their terms laid out for the audience the many innovative ways in which the nonprofit sector has kept pace with dramatic social and political changes, and seismic shifts in policy and program needs.

By 1988, Forbes' mission had shifted from emergency response to fostering excellence in nonprofit management. By the late 1990s, the organization had transformed into facilitating sector-wide agency partnerships and mergers to improve service delivery and enhance innovation.

In 2005, recognizing the need for collective action, the Funds established the Greater Pittsburgh Nonprofit Partnership (GPNP) to advocate for fair state budget funding for the sector. By 2013, Forbes transitioned again to capacity building, social innovation, and partnership. The GPNP Nonprofit Summit was launched, which today, is equal parts inspiration and nonprofit family reunion, serving as an energizing force for all involved.

Forbes has grown significantly over the years, in terms of staff and capacity, and also in degree of reputation for valuable contributions to the civic, cultural, artistic, and cause-directed aspects of

community life. The once-fledgling organization placed under the wing of the Pittsburgh Foundation to deal with a human services emergency is now firmly established as a hub of knowledge, excellence and collaboration for the region's nonprofits.

The 40th panel event enriched the organization's history because it was narrated by the people who made the accomplishments happen. Each of them in their own way and in their own time supported the decades-long work of the Pittsburgh Foundation, modeling the values that Forbes applies to its current work: strategic engagement and collaboration, racial equity and equitable funding, inclusiveness, thought partnership and regeneration through technology and transformational leadership.

The work that is guided by those values complements what we are trying to accomplish at the Foundation in the first year of a strategic plan. Its hallmarks are the centering of racial justice in all we do and a commitment to providing opportunities for all residents to thrive. But no matter what plan we have in front of us, we cannot reach any goals without a healthy nonprofit ecosystem operating along with us. That's why we are grateful to have been a home for Forbes over these past four decades and why we're prideful in what it has grown to become.

Empowering Nonprofits in Southwestern Pennsylvania: The Synergy of the Forbes Funds' Skilly Generative AI and EOS

Fred Brown
The Forbes Funds

The nonprofit sector plays a critical role in addressing social issues, but many organizations struggle with limited resources, funding challenges, and operational inefficiencies. Over the past forty-two years, the Forbes Funds has provided capacity-building support to the nonprofit ecosystem, focusing on back-office support, financial management, and strategic collaboration. Today, through its innovative Skilly Generative AI (Artificial Intelligence), the Forbes Funds provides a transformative solution that, when combined with the Entrepreneurial Operating System (EOS), offers a pathway to sustainable revenue streams for emerging nonprofits in Southwestern Pennsylvania.

THE TRANSFORMATIVE POTENTIAL OF SKILLY GENERATIVE AI

Skilly, the generative AI developed by Maad Labs and the Forbes Funds, is designed to enhance the capacity and impact of nonprofits. Its capabilities are manifold and can significantly improve various aspects of nonprofit operations:

1. **Enhanced Fundraising and Donor Engagement**. Skilly can generate personalized content for fundraising campaigns, crafting compelling narratives and messages that resonate with individual donors. This personalization increases donor engagement and retention, leading to more consistent funding streams.
2. **Operational Efficiency**. Skilly automates routine administrative tasks such as data entry, scheduling, and reporting. By handling these time-consuming activities, Skilly allows nonprofit staff to focus on strategic and mission-critical tasks, enhancing overall productivity.
3. **Data-Driven Decision-Making**. Skilly's advanced analytics capabilities enable nonprofits to analyze vast amounts of data. This facilitates a better understanding of donor behaviors, program outcomes, and community needs, leading to effective decision-making.
4. **Content Creation**. Nonprofits often struggle with creating high-quality content for their websites, social media, and marketing materials. Skilly can generate engaging and relevant content, ensuring consistent communication and outreach efforts without the need for extensive in-house resources.

EOS: A FRAMEWORK FOR SUSTAINABLE GROWTH

EOS offers a structured framework that helps organizations achieve their goals by focusing on six core components: vision, people, data, issues, processes, and traction. For nonprofits, EOS can drive sustainable growth and revenue generation through its disciplined approach:

1. **Vision Alignment**. EOS helps nonprofits clearly define their vision and mission, ensuring that all team members are aligned and working towards the same goals. This alignment attracts donors and partners who share the nonprofit's values and objectives.
2. **People Management**. EOS provides tools for the effective management of staff and volunteers, fostering a committed and motivated team. This human capital is essential for executing programs and expanding outreach.
3. **Data Utilization**. EOS emphasizes the importance of data in decision-making. When combined with Skilly's data analytics capabilities, nonprofits can gain deeper insights into their operations and impact, leading to more strategic resource allocation.
4. **Issue Resolution**. EOS equips organizations with techniques to identify and address issues proactively. This approach ensures that problems are solved before they escalate, maintaining operational stability and efficiency.
5. **Process Optimization**. Efficient processes are critical for nonprofit success. EOS helps organizations develop and document their processes, which can be further enhanced through Skilly's automation capabilities.
6. **Traction and Accountability**. Regular tracking of goals and metrics ensures that nonprofits stay on course. Skilly can assist in monitoring progress and generating reports, making it easier to demonstrate impact to stakeholders and funders.

SUSTAINABLE REVENUE STREAMS

The combination of Skilly Generative AI and EOS offers a powerful framework for emerging nonprofits in Southwestern Pennsylvania to develop sustainable revenue streams:

1. **Grants and Funding**. Skilly can streamline the grant application process, identifying suitable opportunities and generating tailored applications. Personalized donor engagement strategies can also increase individual donations.
2. **Program Revenue**. By leveraging data-driven insights from Skilly, nonprofits can design programs that better meet community needs, potentially generating revenue through service fees or strategic partnerships.
3. **Cost Savings**. Automation of administrative tasks by Skilly reduces overhead costs, allowing more funds to be allocated to mission-driven activities.
4. **Innovative Fundraising**. Skilly can develop creative fundraising strategies, such as virtual events or targeted social media campaigns, reaching a broader audience and increasing revenue potential.

In conclusion, the integration of the Forbes Funds' Skilly Generative AI and EOS provides a robust solution for established and emerging nonprofits in Southwestern Pennsylvania seeking to explore alternative sustainable revenue models. This synergy enhances operational efficiency, optimizes resource utilization, and creates sustainable revenue streams, empowering nonprofits to achieve their missions more effectively and sustainably. As nonprofits emerge as trusted business partners that focus on social impacts, generative AI and EOS play a critical role in cultivating a cross-sectoral ecosystem that optimizes collaboration between corporations, governmental agencies, small businesses, universities, healthcare centers, and community stakeholders. The result is a strengthened cross-functional ecosystem that drives positive change and fosters resilient community development, ensuring resilient people and communities can compete in the 21st-century global economy.

Leveraging Knowledge Management for Organizational Learning and Collaboration in the Western Pennsylvania Nonprofit Sector

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INTRODUCTION

Western Pennsylvania has been profoundly shaped by philanthropic individuals and institutions. The nonprofit sector in Western Pennsylvania encompasses a wide array of charitable organizations and community-based initiatives that aim to address social, cultural, and environmental issues. Historically, philanthropy and nonprofit work has played a crucial role in improving the well-being of individuals and communities throughout the region (Buechel, 2021). From the age of sectarian philanthropy and particular purpose institutions (1800-1890s) to an era of classic institution building and scientific philanthropy (1890s-1940s) to postwar expansion of the nonprofit sector (1945-1990) to our current moment of philanthropic entrepreneurism and collective action, the nonprofit sector in Western Pennsylvania has been closely intertwined with the ongoing public dialogue of what a "good society" looks like (Anheier & Hammack, 2010; Bellah et al., 1991; Buechel, 2021). In our current historical moment, the sector is diverse and includes organizations focused on healthcare, education, social services, arts and culture, and environmental conservation, among others. These organizations operate with a mission to serve the needs of the community and enact positive change, while grappling with complex historical legacies and emerging challenges around innovation, new technologies, and increasing polarization.

In Western Pennsylvania, the nonprofit sector faces unique challenges influenced by various factors such as economic fluctuations, urban-rural disparities, demographic changes, and historical legacies. One particular challenge is the organization, management, harnessing, and stewardship of knowledge. In a moment that is increasingly fast-paced and interconnected, the need for effective, secure, and equitable knowledge management systems is significant. Every organization already has its own ways of managing knowledge. Sometimes these systems, both formal and informal, are effective. Sometimes they are not. The first key to implementing knowledge management systems that facilitate organizational learning and maximize responsiveness is to have a contextual understanding of existing systems (Chakravarthy & McEvily, 2006). This allows for contextual understanding and data-informed decision-making. The second is a recognition that nonprofits operate in a shared ecosystem that is mutually dependent and contains opportunities for synergetic collaboration. This article aims to map an understanding of the theory and practice of knowledge management in the nonprofit sector in general and, more specifically, in Western Pennsylvania. Building on this contextual understanding, the final sections of the article will touch on ethical considerations around knowledge management, cross-sector collaboration, and the challenges and opportunities around the implementation of knowledge management systems.

DEFINING KNOWLEDGE MANAGEMENT

Knowledge management (KM) is a set of integrated systems or practices that facilitates the identification, management, and sharing of an organization's "information assets" (Morey et al., 2000, p. xii). The essential goal of KM as a management function is to accelerate learning and connect team members to resources such as "database[s], documents, policies and procedures as well as unarticulated expertise and experience resident in individual worker[s]" (Morey et al., 2000, p. xii). Although KM is difficult to quantify in terms of return on investment, the various arteries that makeup KM systems are vital to the effective running of an organization.

Over the last two decades, the existing literature around KM has grown exponentially, with significant contributions both from academia and applied contexts. This increase in research has benefited the field as a whole in an era of rapid technological advances and emerging concerns around data privacy and security. KM literature can be divided into three primary organizing areas of focus: 1. Strategy, 2. Process, and 3. Metrics (Morey et al., 2000; Sveiby, 2001). Each of these areas provides important coordinates for the field. For the purposes of this article, we will primarily be discussing process and metrics in the following sections. A discussion on strategy will be broached in the later part of the article.

The Process of KM

The process of KM in an organizational context is an ongoing activity that involves various methodologies, people, and technologies (Junnarkar, 2000). Junnarkar emphasizes the importance of individual and social learning in KM processes. For Junnarkar, an individual's learning can be managed and facilitated through software and other technological tools that manage the learner's context. Social learning, on the other hand, is a kind of social phenomenon that is heavily influenced by "personal relationships, values, cultural orientation, and many other social factors" (Junnarkar, 2000, p. 136). This "ultimate act of learning" is the result of communicative engagement involving interpersonal, intercultural, and organizational communication elements. The learning process itself is facilitated both by content, which is provided by tools, and context, which is provided by people. These two coordinates, content and context, establish important delineation for the process of learning laid out by the field of KM.

Content and context are often subject to change. As new technologies emerge, innovative systems are implemented, personnel transitions take place, and the kind of learning that we experience evolves. In a case study examining the changes that took place in a laboratory starting in the 1980s, Willet (2000) explores the procedural paradigm shift that took place as the organization moved from a "chain of command" model to a "web of influence" model for KM. Although these changes were accompanied by frustrations, especially from upper management, who were accustomed to the prior way of operating, the new system began to take root over time. This process involved the installation of new technology, dealing with institutional rigidity and pushback from stakeholders, organizational restructuring, and consistency played out over time (Willet, 2000).

There can and will often be challenges when updating or adjusting processes related to KM. The dialectic process that takes place around the organization and use of knowledge requires attentiveness to contextual elements. As Arnett, DeIuliis, and Corr (2017) point out in their analysis of the Deepwater Horizon oil spill in the Gulf of Mexico in *Corporate Communication Crisis Leadership: Advocacy and Ethics*, attentiveness to background communicative issues assists with decision-making around foreground communication. When navigating tensions related to KM processes, it can be helpful to cultivate an attentiveness to the dialectic that Junnarkar (2000) highlights: namely, the push and pull between content and context.

The Metrics of KM

As an ongoing field of study and area of practice, KM presents multiple opportunities for the strengthening of systems and the deepening of theory. Karl-Erik Sveiby, an expert on KM metrics and assessment, advocates for an approach that takes both the possibilities and limitations of data to heart. With an acknowledgment that some scientific approaches can be inadequate for measuring social phenomena, Sveiby (2018) approaches the question of measuring the effectiveness of KM with practical humility. There are three dangers that Sveiby specifically warns about when it comes to metrics related to KM. The first has to do with false perceptions about the relationship between measurements and control. Better metrics and systems do not always automatically equate to better outcomes. When dealing with social phenomena, it is important to acknowledge that scientific accuracy can only take us so far. The second issue has to do with public relations. Sveiby cautions against overly optimistic narratives that selectively curate stories and metrics that do not offer a complete picture of the organization's true position. Rather than ethically and responsibly stewarding the organization's knowledge base, these skewed narratives cloud and distort key stakeholders' views of an organization. The final challenge for Sveiby is the cost of time. Organizing knowledge and translating that into actionable data that answers important questions for an organization takes an enormous amount of time and energy. Fortunately, there are some guiding coordinates that can be used to avoid some of these hurdles and navigate the process of KM efficiently and in a way that prioritizes positive outcomes for the organization.

Toward the goal of successfully navigating the challenges of measuring intangible data, Sveiby (2018) offers a list of "42 Methods for Measuring Intangibles," which brings together material from a variety of scholars whose work spans three decades. These methods were organized into four categories: 1. Direct Intellectual Capital Methods (DIC), 2. Market Capitalization Methods (MCM), 3. Return on Assets Methods (ROA), and 4. Scorecard Methods (SC). Each of the four categories brings a particular focus or a set of approaches to the challenge of measuring the impact of data. MCM and ROA both focus specifically on aspects related to financial health and solvency. In contrast, DIC and SC approaches attempt to understand organizations holistically, relying heavily on contextual factors to measure effectiveness at both the micro and macro levels. When deciding which method to use for measuring KM, Sveiby (2018) offers five factors to take into consideration: 1. Control, 2. Valuation, 3. Justification, 4. Situational Learning, and 5. Audience. Although it would be difficult to find one method to fulfill every measurement need related to KM, Sveiby sees a strategic mixed methods approach as a viable option for measuring intangible assets.

KEY COMPONENTS OF KNOWLEDGE MANAGEMENT

Knowledge management in relation to nonprofits refers to the systematic process of capturing, organizing, storing, retrieving, and sharing knowledge assets internally, and, ideally, externally to other nonprofit organizations. It involves identifying, creating, and leveraging knowledge to support organizational learning, collaboration, and innovation (Iverson & McPhee, 2002). Nonprofit knowledge management encompasses both explicit knowledge, which is codified and easily articulated, and tacit knowledge, which resides in individuals' expertise, experiences, and insights (Cantara et al., 2017). The aim of these processes is to enhance organizational effectiveness, responsiveness, and impact by leveraging the collective knowledge of individuals and the organization as a whole, which begins with an organization's core culture.

Knowledge creation is a fundamental aspect of nonprofit organizations that strive to foster a culture of learning and innovation, thus stimulating the generation of new knowledge. The process of knowledge creation involves the active promotion of opportunities for information generation,

including activities such as research, monitoring and evaluation, feedback mechanisms, and reflection on experiences and best practices (Davenport, 2006). Through these endeavors, nonprofits aim to develop and internalize knowledge within their organizations.

To preserve and make valuable knowledge accessible to individuals within the nonprofit, mechanisms for knowledge capture and storage are employed. These mechanisms encompass various tools and systems such as documentation, databases, intranets, knowledge repositories, and other information management systems (Davenport, 2006). By capturing and storing knowledge, nonprofits transform intangible insights into tangible assets that can be accessed and utilized by those who do not have direct experience.

Furthermore, nonprofits employ frameworks, technologies, and strategies to facilitate the retrieval and dissemination of knowledge. This includes the utilization of search engines, collaborative platforms, social networks, knowledge sharing events or workshops, and other communication channels (Davenport, 2006). These mechanisms enable individuals to effectively access and share knowledge within the organization. However, the success of knowledge retrieval and dissemination heavily relies on the shared experience level of staff, volunteers, and other stakeholders (Iverson & McPhee, 2002; Melton, 2007). It is crucial that every person who requires the information is capable of navigating and searching the organization's internal processes; otherwise, the knowledge retrieval and dissemination efforts become futile.

Cross-sector collaboration is a vital aspect of knowledge management, facilitating the exchange of information and fostering collaboration among nonprofit organizations, government agencies, businesses, and other stakeholders (Hayes, 2023). In Western Pennsylvania, where numerous nonprofits intersect and refer to one another, establishing collaboration among organizations within the sector can help address challenges collectively and mitigate issues related to turnover and continuity. Additionally, knowledge management initiatives enable nonprofits to assume leadership roles within their communities. By leveraging knowledge assets and engaging in information sharing, nonprofits can effectively advocate for social change, influence public policy, and drive community development. This entails actively engaging stakeholders, seeking their input and feedback, and utilizing knowledge to inform decision-making processes.

However, nonprofits implementing KM may encounter certain challenges. Limited resources, resistance to change, organizational culture, and technological barriers can impede the successful implementation of knowledge management practices (Chakravarthy & McEvily, 2006). To address these challenges, nonprofits can establish a supportive culture that values knowledge sharing, provides training and capacity-building opportunities, incentivizes knowledge sharing efforts, and fosters a learning-oriented environment by adapting information from project management (Chakravarthy & McEvily, 2006; Melton, 2007). It is also important to adopt appropriate technologies, ensure data security, and promote collaboration and learning across the organization.

Overall, KM plays a pivotal role in enabling cross-sector collaboration, empowering nonprofits to assume leadership roles, and addressing challenges through the effective exchange of information. By implementing best practices and overcoming obstacles, nonprofits can harness the power of knowledge to drive positive change and create a more resilient and impactful sector.

BENEFITS OF KNOWLEDGE MANAGEMENT

The principles and practices of KM have a variety of benefits associated with them, including, but not limited to, increased efficiency related to resource management and "resource conservation knowledge," smarter and more collaborative innovation, the ability to tell better-informed stories with data, and greater fidelity to desired organizational outcomes (Chakravarthy & McEvily, 2006; Friedman et al., 1991; Rehman et al., 2021). In terms of resource management, nonprofits are particularly

vulnerable to the attrition of valuable resources such as time, money, and human capital (Melton, 2007). One of the important aspects of KM is its ability to provide continuity across personnel transitions. A robust KM system helps to ensure that vital information related to the functioning of the unit is not lost when an employee moves on from a particular role. These systems can also help to identify areas where best practices may not already be in place.

Much like a master carpenter going over the interior of a boat, KM systems can help to identify holes in current practices that could potentially be shored up to prevent the seepage of organizational effectiveness. Efficient knowledge management systems can also assist with the facilitating of innovation and collaboration around "resource orchestration," leading to the discovery of competitive advantages. Having more robust information organization tools also sets the stage for telling better stories with data. Computational narratology, large language models, and generative AI, in particular, provide intriguing options for extrapolating data and making it accessible to a wide range of stakeholders. Overall, the benefits of KM lend themselves to the development of organizational resilience through the strengthening of systems and increased fidelity to the organization's mission. KM provides a framework for organizational learning and long-term growth by connecting information and theory to concrete practices.

ORGANIZATIONAL LEARNING AND COLLABORATION

The link between KM, organizational learning, and collaboration forms a symbiotic relationship within nonprofit organizations. KM enables the capture, organization, and sharing of knowledge, fostering organizational learning (Le & Tuamsuk, 2023). Organizational learning, in turn, enhances collaboration by creating a culture of continuous improvement and shared knowledge. Collaboration, supported by knowledge and organizational learning, leads to innovation, effective problem-solving, and improved outcomes. By recognizing and leveraging this link, nonprofit organizations can strengthen their capacity to address sector-wide challenges, foster a culture of learning, and promote collaboration among stakeholders. By embracing KM, organizational learning, and collaboration as interconnected pillars of success, nonprofits can enhance their impact and work towards achieving their missions with greater efficiency and effectiveness.

KNOWLEDGE CAPTURE AND DOCUMENTATION TECHNIQUES

Knowledge capture and documentation techniques are essential for effectively capturing and preserving knowledge within nonprofit organizations. There are several different options to capture transferable knowledge/experience depending on the style and preference of the organization.

Documentation and Standard Operating Procedures (SOPs) play a crucial role in knowledge management within nonprofits which borrow from project management tools. By documenting processes, procedures, and best practices, organizations can capture and share knowledge in direct apprenticeship (Chakravarthy & McEvily, 2007). SOPs provide step-by-step instructions and guidelines for various tasks and activities, ensuring consistency and enabling knowledge transfer. They serve as a valuable reference for future use and contribute to organizational learning. Nonprofits can develop internal documentation templates, style guides, and knowledge repositories to facilitate knowledge capture through documentation.

Lessons learnt reports are another important component of documenting knowledge management. These reports capture insights gained from past projects, initiatives, or experiences. By documenting successes, failures, challenges, and recommendations for improvement, organizations can avoid repeating mistakes and capitalize on successes (Melton, 2007). Lessons learnt reports serve as a valuable resource for internal knowledge sharing and organizational learning. They can be shared

within the organization as well as externally with other nonprofits and stakeholders while detailing specific encounters.

Knowledge Mapping is a technique used to visually represent the expertise, skills, and knowledge areas within an organization (Melton, 2007; Patzak & Rattay, 2012). This involves identifying subject matter experts, key individuals, and their respective areas of knowledge for others to use. By creating knowledge maps, nonprofits can gain a better understanding of their internal knowledge resources, identify gaps in knowledge, foster collaboration among individuals with complementary expertise, and pinpoint potential mentors or resources. Various techniques such as expertise profiling, knowledge matrices, or knowledge directories can be employed to effectively carry out knowledge mapping.

Storytelling and Knowledge Sharing Sessions serve as valuable methods for capturing tacit knowledge within nonprofits. Through these sessions, individuals can share their experiences, insights, and lessons learned in a narrative format. Nonprofits can create platforms such as workshops, team meetings, or dedicated knowledge-sharing events to facilitate these storytelling sessions created to meet their needs. It is crucial to record and document these sessions to ensure that the knowledge shared is captured and can be accessed by others within the organization.

In addition to capturing tacit knowledge, it is equally important to identify and capture explicit knowledge. Explicit knowledge refers to formalized and codified knowledge that can be easily articulated and shared (dos Santos Ferreira, 2014). Nonprofits can employ various strategies for identifying and capturing explicit knowledge. These may include developing documentation, such as manuals, guides, and reports, that document processes, procedures, and best practices. Furthermore, establishing repositories or databases where explicit knowledge can be stored and accessed by individuals within the organization can significantly contribute to effective knowledge management.

As an organization is looking for the best systems and platforms to meet its particular KM needs, there are at least two major categories to consider. On one hand are encyclopedic-like tools that store large amounts of useful and relevant information. On the other is a community of practice model that facilitates collaboration (Coakes & Clark, 2005). There are a variety of platforms, both online and physical, that promote knowledge sharing in an encyclopedic manner. Often, these platforms are specific to a particular subject or field. For example, Candid is an industry leader in grant discovery and submission. In addition to paid services, Candid provides a slew of free educational resources related to securing funding for nonprofits. Another popular knowledge sharing system is Keela, which provides subscription-based access to data management tools and databases. These encyclopedic KM systems can also be as simple as platforms like Google Drive, Box, or SharePoint. The community of practice model encourages information sharing and stewardship through relational means (Coakes & Clark, 2005). From dedicated Facebook groups and Reddit pages to social sector leadership coaching to more formal associations and membership organizations, like the Greater Pittsburgh Nonprofit Partnership (GPNP), communities of practice offer not just access to information but also the possibility of active collaboration towards shared goals (Maier, 2022; Ritesh, 2016).

At their best, KM strategies combine encyclopedic knowledge with communities of practice to create collaboration across multiple sectors. One example of this centers around the development of the Internet. The first pieces of what later became the Internet were initially developed by the U.S. Department of Defense (Detti & Lauricella, 2017). Over several decades, a team of academic and military researchers engineered the technology to provide the bedrock of the Internet, known initially as ARPANET. In the 1980s, private interests began to connect to the larger network systems and technologies that had been pioneered by ARPANET. Gradually, beginning in the 1990s, control of the Internet was turned over to the Internet Corporation for Assigned Names and Numbers (ICANN). ICANN is a nonprofit organization originally tied to the University of Southern California that inherited many of the governance and oversight functions of the Internet from the U.S. government. As the Internet began to develop outside of the original projects and organizations funded by

the United States Department of Defense, multiple nonprofit organizations emerged and counterbalanced commercial interests. One of the major entities to play an active role in the development and administration of the Internet today is the Internet Society (ISOC) (Radu, 2019). ISOC exists to, along with its international partners, "extend the Internet's reach and protect its long-term well-being" (Internet Society, 2022). With more than 90,000 individual members and dozens of chapters around the world, ISOC champions the cause of making the Internet accessible to all and actively works to keep the Internet from being fragmented into individual networks under governmental or commercial control (Internet Society, 2022; Radu, 2019). Multiple standard-setting bodies operate out of ISOC, including the Internet Engineering Task Force (IETF), the Internet Architecture Board, and the Internet Engineering Steering Group (IESG).

Through the development of databases and communities of practice, governmental entities, for-profit interests, and nonprofit organizations have shaped and managed the complex set of systems that make up the Internet. These systems have worked with a high degree of effectiveness and have allowed the Internet to remain remarkably nimble and iterative.

AN ECOSYSTEM APPROACH FOR KNOWLEDGE STEWARDSHIP

Although KM systems are important, the nonprofit sector is uniquely positioned to go beyond the bounds of traditional KM. Rather than simply managing knowledge, like a dam that controls access to a reservoir, nonprofits, by their very nature, can create and steward knowledge ecosystems that extend beyond any one entity's control. This opportunity stems from the common purpose of the nonprofit sector. While private sector entities exist primarily to generate profit for an organization's shareholders, nonprofits operate toward a shared common good. Large-scale objectives like the United Nations' Sustainable Development Goals become more attainable when they are driven forward by "inclusive partnerships" that prioritize representation, dialogic negotiation, and pooling together resources (Mann, 2021). While there may be a competitive advantage to be obtained from a for-profit company walling off access to information, there is consistent evidence across a wide range of metrics that increased generosity and openness around information can lead to more effective collaborations, greater community buy-in, and shared prosperity (Alam et al., 2022; Ichijo & Nonaka, 2007; Johannessen, 2021; Osborne et al., 2022).

The principles of KM are important for nonprofits in the gathering and organizing of crucial information for an organization's mission work. However, when the literature around KM is brought into conversation with animating principles from the nonprofit sector, a new model begins to emerge. It is an approach that builds upon and goes beyond traditional KM. It is a model more akin to the stewardship of knowledge ecosystems. What we are calling Knowledge Stewardship (KS) differs from Knowledge Management in three key ways:

1. KS starts from an initial posture of openness. Stewardship, in contrast to management, does not presuppose the right of ownership. It acknowledges that there are legitimate claims of ownership and seeks to welcome a multiplicity of voices to the decision-making table. This does not preclude the ability to block some information that might be damaging or dangerous if it were to fall into the wrong hands. Navigating this tension between open access and gated entry is an essential part of implementing KS.
2. KS acknowledges that knowledge is a shared resource and that we who are currently taking care of that knowledge and using it to make decisions have an obligation to those whose shoulders we stand on and a responsibility to those who will come after us. Practically this involves education as to the concerns and hopes of previous generations. It also involves care for the systems and mechanisms that will pass down knowledge to future generations.

3. Fundamentally, KS must operate according to a new kind of Hippocratic Oath, adding a layer of further responsibility to knowledge itself. Not only to "do no harm," but to wield knowledge with a commitment to do good. Although we cannot predict every outcome and every action opens us to unforeseen implications, operating within a knowledge ecosystem obligates us to care for the structure of the system itself, as well as those embedded within.

Addressing issues of information overload and knowledge silos are critical for enhancing cross-sector collaboration among nonprofits and promoting ethical community engagement. Scholarly research emphasizes the importance of implementing effective strategies to mitigate these challenges (Cantara et al., 2017; dos Santos Ferreira, 2014). One approach is the adoption of KM practices that prioritize information filtering and organization. This involves leveraging technologies such as knowledge repositories, collaborative platforms, and social networks to facilitate the categorization, organization, and dissemination of relevant information (Cantara et al., 2017; dos Santos Ferreira, 2014). By providing clear structures for accessing and sharing knowledge, nonprofits can prevent information overload and ensure that valuable insights are readily accessible to stakeholders.

Furthermore, fostering a culture of collaboration and knowledge sharing is essential. This can be achieved through the establishment of communities of practice or collaborative networks that encourage the exchange of ideas and expertise among different organizations (Brady et al., 2015). These communities provide a platform for sharing best practices, lessons learned, and resources, thereby reducing knowledge silos and enabling cross-sector collaboration. Another strategy is the implementation of effective communication channels and protocols. Regular communication, both formal and informal, helps to disseminate important information efficiently while reducing the risk of overwhelming stakeholders with excessive data (Pettigrew et al., 2016; dos Santos Ferreira, 2014). This can be achieved using targeted newsletters, periodic updates, and collaborative meetings that prioritize the sharing of relevant and actionable information.

Overall, addressing information overload and knowledge silos requires a multifaceted approach that combines technological solutions, cultural shifts, and streamlined communication practices. By adopting these strategies, nonprofits can enhance cross-sector collaboration and ethical community engagement by effectively managing information and knowledge flow.

CONCLUSION

KM is an important cornerstone of a nonprofit's operational framework. We live in an increasingly interconnected world that moves at a fast pace driven by data. Without an effective set of systems and strategies for KM, an organization is at a strategic disadvantage when it comes to the fulfillment of its mission work. When the principles of KM are in place (creation, storage, retrieval, and dissemination of knowledge), there is space for leadership to make data-informed and ethically sound decisions in real time that impact the well-being of employees, community members, and other stakeholders.

When implementing KM systems and strategies, it is important to learn from the for-profit world while also keeping in mind that nonprofits are operating with a different set of end goals. Rather than erecting artificial barriers on the flow of information that are used to manage profits, nonprofits are uniquely positioned to be able to participate in and steward a mutually beneficial ecosystem of knowledge. In many ways, this is already being done in the sector. The Forbes Funds, a pillar of the Western Pennsylvania nonprofit community, is an excellent example of an organization that helps to utilize the power of collaborative learning and institutional generosity. As nonprofits in Western Pennsylvania embrace KM there is room for more creativity and partnerships. Together, we can leverage KM for organizational learning and collaboration in the Western Pennsylvania nonprofit sector and have a record of it for those to guide us into the future.

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Adaptive Leadership in the "New Normal": Lessons for Nonprofit Leaders

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INTRODUCTION

I currently work as a Program Officer at the Grable Foundation in Pittsburgh. In my role, I help to bring financial resources to programs and opportunities that tangibly improve the lives of children and youth in our region. Prior to this work, I spent the better part of the last decade in leadership roles in public schools and in nonprofit organizations. I was a central office administrator in both human resources and student services at a large public school district, an executive director for a small youth-serving organization offering after-school enrichment and summer programming for middle schoolers, and a chief operating officer for a mid-size charter school system serving students from elementary through high school. As any organizational leader can attest, there are constant challenges, unexpected surprises, and difficult situations that we must navigate to keep our organizations and initiatives afloat. The purpose of this article is to contextualize the myriad challenges that nonprofit leaders face and offer recommendations for managing these challenges in our current climate.

UNDERSTANDING ADAPTIVE LEADERSHIP

Early on, I faced no shortage of crises and difficult challenges that pushed my leadership mettle to the brink. These challenges included managing a process for implementing a large-scale workforce reduction, creating and ensuring success with a long-term sustainability strategy for a previously 100% grant-funded initiative, and transforming an organization from historical paper-based to technology-based process management, including building the will and skill of human capital to make this transformation successful. I recognized early that all these challenges involved complex systems and inter-workings with others and that an understanding of these variables was necessary to be the most effective manager that I could be.

 As a result of these and other challenges, I discovered an internal desire to enhance my personal leadership development with a dual-end goal of ensuring organizational outcomes were at the forefront while involved stakeholders had their needs recognized, respected, and addressed. To satisfy this desire to expand my leadership potential, in 2017 I enrolled at the University of Pittsburgh School of Education to pursue a doctoral degree focused on practical leadership in education-based organizational settings.

 My early coursework in this program was influenced by the concept of adaptive leadership. Posited by Harvard University scholars Ronald Heifetz, Alexander Grashow, and Marty Linsky (2009), adaptive leadership, simply speaking, is a means for organizational leaders to lean into and accept complexity and change as part of the leadership process while encouraging risk-taking and potential failure to incubate innovation. The undergirding assumption of this approach is that by thinking and operating in adaptive ways, the leader is much more likely to be level-headed and stable in decision-

making when challenges arise. As Garvey Berger and Johnston (2015) state, "as leaders, we often use threats and stresses as powerful prompts to action, there is a cost in this: it is much harder to learn when you're faced with threat" (p. 18). I felt I needed more practical and applicable leadership skill development to deal with these threats and stresses as they would arise so that I could be self- and organizationally aware enough to keep the ship afloat during times of storm. Little did I know how important this development would be in managing the storm that would hit us in two and a half years!

OPERATING AS AN ADAPTIVE LEADER

Near the end of 2019 I was hired into what would at the time be the most significant nonprofit leadership role of my career, that as the chief operating officer for a Pittsburgh-area charter school system. The school operates four buildings and has a staff of over 200 who lead the public education of over 1,000 students. As part of my role, I was responsible for all facility management and maintenance, organizational human resources and employee relations, information systems and technology, and the organizational long-term programmatic and financial sustainability. I also shared responsibility for districtwide safety and crisis management and was the lead negotiator for a first collective bargaining agreement between the school and its professional staff.

Early in my tenure, and buoyed by my new development in adaptive leadership, I spent much of my initial months in the role questioning, listening, and learning. Journalist Warren Berger (2014) holds that it is important for leaders to engage in intentional questioning of the status quo, as too often those who are frequently underserved and overlooked are forced to settle for good enough with no one in power asking why. I would spend a lot of time quietly observing, actively listening, and questioning why things exist as they do. I also tried to spend a bulk of my early time "on the balcony," a process by which leaders get "off the dance floor and onto the balcony…to gain some distance, to watch yourself as well as others while you are in the action, and to see patterns in what is happening that are hard to observe if you are stuck at the ground-floor level" (Heifetz et al., 2009, p. 32-33). This adaptive process served me well and allowed me to be reflective and intentional in all aspects of my leadership. This all went predictably well until March 13, 2020.

THE COVID STORM: ADAPTIVE MANAGEMENT UNDER NEW CIRCUMSTANCES

As early as February 2020, our school-wide crisis teams had been meeting weekly to plan any learning and safety contingencies related to the novel coronavirus. All credit to an extremely proactive and well-prepared academic team, when the Pennsylvania governor announced what at the time was to be a 10-day shutdown of all schools, announced midday on Friday, March 13, every student left the building with a Chromebook and a plan to engage in remote learning the following Monday.

Granted, there were many leadership challenges I faced during the height of the pandemic. Some challenges unique to operating a school system like effectively converting the act of teaching, which by its nature is a highly social and relational artform, to an indirect medium over a Zoom screen. And other challenges that all organizations faced, like maintaining positive organizational culture through an environment that had cultivated disconnection from others, including cherished loved ones, with the goal of keeping everyone safe and healthy. All these can take a toll on individuals both physically and mentally, and I was no less immune to these lasting negative impacts than I was to the virus itself.

Taking a balcony-level look at my time in this leadership position, I found that most of the difficult adaptive challenges came during the rebuilding phase of the pandemic, specifically getting in-person students, staff, and operations back up and running. While the challenges of the global shutdown and stay-at-home were huge and hairy, many also could be categorized as technical as opposed to adaptive, with the main differentiator between the two being that technical challenges have a much

clearer and more straightforward solution (Heifetz et al., 2009). For example, during the shutdown we found that many students either did not have regular home internet access or did not have internet access reliable enough to manage what ultimately turned out to be multiple siblings and parents all streaming school and work simultaneously.

While certainly a difficult challenge involving lots of logistics to manage, the problem itself was simple to identify and the corresponding solution was straightforward and clear: e.g., get students hotspots or work directly with internet service providers to increase bandwidth. The adaptive challenges could generally be categorized as these big new complex problems that didn't necessarily have a clear solution, or even any solution that would fully address the problem! Primarily, I was facing the challenge of how one can balance evolving health and safety mandates in a school setting while meeting the extremely diverse needs of all stakeholders to effectively run the organization? For example, how can learning environments be designed to accommodate all students, include six feet of physical distance, operationalize regular hygiene practices, and ensure a low level of virus transmission? Or how can building airflow and ventilation be enhanced in aging facilities with no forced-air HVAC systems to the comfort and satisfaction of students and staff? Or how can staff, many of whom buoyed by a newly established trade union, be encouraged and incentivized to feel safe and comfortable returning to in-person work? These adaptive challenges were far from exhaustive of all I faced over the course of the pandemic but are representative of the types of difficulties that many leaders faced in an attempt to re-establish what would be the "new normal." With the context of these types of challenges, in the following session I will summarize the key learnings and takeaways I believe are important for nonprofit leaders to be aware of when managing adaptive challenges today.

ADAPTIVE LEADERSHIP IN THE "NEW NORMAL"

The Covid-19 Pandemic was indeed a challenge for nonprofit leaders. On face, it seems as though it would be the most difficult challenge of a leader's lifetime: i.e., to lead effectively through so many unexpected obstacles. But from an adaptive leadership lens, at its core, practicing adaptive leadership is to expect and accept discomfort, "you need to live into the disequilibrium" (Heifetz et al., 2009, p. 29). What has pushed us all out of our collective comfort zones and forced us to tackle new challenges, ones that we never dreamed of tackling before more than Covid? Any leadership challenges, be they big or small, are manageable once you lean into the discomfort and initial distress and better understand all that the challenge brings in terms of opportunity. With this in mind, I offer the following considerations for nonprofit leaders who are looking to tackle challenges in the most adaptive ways: 1. Lead with Joy, Kindness, and Grace; 2. Balance Stakeholder Feedback with Scope of Authority; 3. Recognize and Cultivate Untapped Talent; and 4. Care for Yourself to Care for Everything Else.

LEAD WITH JOY, KINDNESS, AND GRACE

"Happy Thursday!" folks will often hear me gleefully exclaim when joining a meeting, introducing myself, or passing in a hallway, replacing "Thursday" with what the current day of the week. It generally brings a smile and a "Happy Day!" response back from the recipient, even those who are in the worst moods. I started this routine early in my career when I noticed that there were so many folks who would walk around the halls of my workplace with a frown or scowl. My thinking was that if I could try to make even a small moment in their day a bit brighter, that makes it worth it. And then it just stuck and became my regular thing. This routine became particularly important during the pandemic. As we all braved through so much worry, uncertainty, fear, and even death, we all lacked even small moments of joy and happiness. Continuing my routine of at least trying to make people smile through a happy word was a small attempt at rekindling a bit of daily joy.

As a leader, it is also important to recognize the impact of kindness and grace. I could have chastised those grumpy grumps whom I would encounter. But this does not offer the benefit of best intentions assumed. We never really know the personal struggles that others are going through. In assuming that it's not *me* that they are grumpy with, but instead something that must be really challenging and upsetting, they, more than anyone, are owed a kind word and understanding. These acts help to establish a consistent baseline of friendly respect with everyone and help to position the leader as a source of trust. When individuals recognize a leader as someone who provides a safe and positive space, that leader then becomes much more of a safe and approachable person during time of conflict.

BALANCE STAKEHOLDER FEEDBACK WITH SCOPE OF AUTHORITY

Trust is an important characteristic for a leader to develop and cultivate as it helps set a foundation for stakeholder relationships. An effective adaptive leader is intentional in establishing relationships built on trust with all people. This trust is important when you as the ultimate authority must go against the consensus desires of others. When you have this foundational trust, it is much easier for others to accept a disappointing outcome. During the pandemic, I can recall many conversations with staff who wanted to express their concern, frustration, and anger with me after we had made the decision to return to in-person learning. I believe that the trust that I and my leadership colleagues were able to build with our stakeholders over the years helped to make this decision a bit more palpable for those who were still understandably emotional.

This is not to suggest that stakeholder feedback is not important, quite the contrary. As part of your work "on the balcony," you want to listen to understand, not to just listen to hear, everyone and everything. But I offer a bit of caution with stakeholder feedback. It is important to clearly level-set expectations around those providing feedback. As a leader, *you* are authorized to make the decision and manage the process. I have often found myself musing to my fellow leaders, "Remember: we are not in a democracy." Decisions are not made by majority vote and rule. This would make moot the person or persons authorized to lead! It is also important to have clear bounds in place for when feedback can and should be collected. There comes a point when it is simply too late for feedback to have an impact on the ultimate decision. It is imperative that the leader not let endless process be the death of progress. However, without a foundation of trust built with all stakeholders, this becomes a much more difficult concept to grasp and often can lead to conflict.

Finally, in recognizing and accepting that the role you hold as a leader will inevitably disappoint some, it is important to offer a rationale for significant decisions that may have polarized your stakeholders. Clarifying the *why* is a great strategy for building up that critical foundation of trust with stakeholders as even those who are disappointed will gain a clearer understanding of the decision.

RECOGNIZE AND CULTIVATE UNTAPPED TALENT

As an adaptive leader closely listening and observing to gather as much data to aid decision-making, you also are afforded the opportunity to identify untapped potential and talent within others. This potential is particularly easier to spot during times of crisis and challenge, when many are forced to take on roles and tasks that had previously been unfamiliar or unexplored. I found this to be commonplace during the pandemic. Think back to your experience from 2020 through 2022. How many of you had to become experts and posit opinions on the efficacy of masking, vaccines, and other public health practices? This certainly is a facetious example in the context of identifying untapped talent as most of us are not going to instantly become epidemiologists. However, as a result of new required workstreams and routines, I observed and ultimately promoted several individuals over the pandemic who had shined in taking on these new and unexpected responsibilities. I am not sure that

had I not been "on a balcony" during a time of crisis operating in peak adaptiveness I would have recognized this talent as immediately. This is to serve as a word of caution to leaders. It doesn't (or shouldn't) always take a huge crisis to recognize, cultivate, and reward internal talent. By being a leader who empowers those around them to take on leadership opportunities and decision-making, this creates a culture that allows others to step in naturally during a crisis.

CARE FOR YOURSELF TO CARE FOR EVERYTHING ELSE

Self-care, self-care, self-care. We in the nonprofit sector talk about the importance of self-care *all* the time. But be honest. How much is it you as a leader telling your staff that *they* need to engage in self-care, while you're staying up until midnight catching up on 100 emails or finishing that pesky grant application? No judgment, I've been there! Earlier in my career, I remember a time where three of my colleagues and I stayed in the office until 3:00 a.m. to finish sending HR notifications to hundreds of staff. We had ourselves convinced that it would be the end of the world if those notices didn't go out before sunrise. As a younger professional, I was all about the "rise and grind" culture that seems to permeate American workplace expectations. I have since evolved past this mindset and actively taken a much more balanced approach to work. The pandemic only strengthened this internal mindset for me as it helped to bring to light for me what is really important. I often say, most of us are not doctors. What we are doing often does not have immediate life or death ramifications. That email, that grant report, that "urgent" call from a staff member at 10:00 p.m., can wait.

But it's not enough as a leader to just feel and understand this. It is vital to model this. Like it or not, as a leader everything that you do is closely observed by your staff. You can say that you want your staff to leave by 5:00 p.m. as working more than eight hours in a day is detrimental to their self-care. But if you are regularly in the office until 7:00 p.m., you are sending an unintended message on what the expectations really are. As a leader, I always transparently share my own self-care actions with my team: e.g. taking full use of my allotted vacation time or unapologetically taking mental health days when I know I am not at 100%. These actions demonstrate self-care for others as it becomes more of a "normal" and accepted practice. I also appreciate that my philanthropy friends share in this understanding of the importance of self-care and continue to invest in paid sabbaticals for nonprofit leaders (Hagen, 2023). I strongly support and encourage more investment in these types of opportunities to ensure that nonprofit leaders continue to invest in and nurture their own wellbeing.

CONCLUSION

Of the suggestions I list above, I have with certainty broken every one of them multiple times throughout my career. But that's the beautiful thing about being a leader, isn't it? We know full well that we will mess up. It is bound to happen. But it is how we pick ourselves back up and continue to move forward that makes us the most effective and excellent leaders that we can be.

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A Case Study of Nonprofit Wins in the Southwestern Pennsylvania Region

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PURPOSE

In this report we hope to examine trends of nonprofit organizations located in the Southwestern Pennsylvania Region that recently received funding from grants and large donations. Additionally, we are going to focus on the relationships between the funding of nonprofits and which of the United Nations Sustainable Development Goals (UN SDGs) and World Health Organization Social Determinants of Health (SDOHs) those nonprofits strive to.

SECTOR SNAPSHOT

For this case study, we looked at 66 nonprofits that received external funding through grants and donations, and are located in Allegheny, Beaver, Greene, Mercer, and Somerset Counties. Data were collected post-pandemic from 2022 to 2023. The overall amount of funding we examined was $22,429,581. Of the 66 nonprofits, 15 were members of the Greater Pittsburgh Nonprofit Partnership (GPNP). These organizations include: Assemble, the YWCA of Greater Pittsburgh, Casa San Jose, Big Brothers Big Sisters of Greater Pittsburgh, Ruth's Way, Youth Enrichment Services, YouthPlaces, 1Hood Media Academy, 25 Carrick Ave. Project, Brothers and Sisters Emerging, Center of Life, Pittsburgh PROMISE, the Kingsley Association, and the Trade Institute of Pittsburgh. It should be noted that we were only able to locate a few instances of nonprofits receiving funding in some of the listed counties. Therefore, any conclusions and analyses are limited and may not accurately reflect trends.

DATA OVERVIEW

For each nonprofit, we collected the name, the zip code, the county the nonprofit is located in, the amount of funding received, and the UN SDGs and SDOHs with which their mission mostly closely aligned. A majority of the data and funding examined was from Allegheny County, with 58 out of the 66 nonprofits we examined serving those communities.

DISTRIBUTION OF FUNDING/FOCUS BY ZIP CODE

The nonprofits were spread out among 31 zip codes. In some cases, there were up to six nonprofits within the same zip code. Two nonprofits who received funding did not have an address listed online, so we were unable to determine where they were located. The zip codes that received the most funding were 15212, 15219, 15203, and 15206, with 15212 receiving approximately $11.35 million. It is worth noting that one nonprofit in the zip code 15212 received $10 million, which is an order of magnitude greater than the amount of funding received by the other nonprofits.

DISTRIBUTION OF FUNDING BY UN SDG

Certain UN SDGs received significantly more funding than others. Based on our findings, UN SDGs 3, 4, and 10 received the most funding, with UN SDGs 1, 2, 5, 6, 7, 12, 14, 15, and 16 receiving little to no funding. The UN SDGs that received the most funding is mostly consistent with the number of nonprofits that are working towards each UN SDGs. Most of the nonprofits focused on UN SDGs 3, 4, 10, and 17. It is worth noting that UN SDG 3 received a disproportionate amount of funding, with UN SDG 8 receiving less funding compared to the number of nonprofits working towards it.

CONCLUSIONS

Looking at the distribution of funding for the UN SDGs shows that good health and well-being, quality education, and reduced inequalities were the most heavily funded and focused on goals post-pandemic. This trend is supported by looking at the distribution for funding for SDOHs with housing, education, healthcare, and social inclusion receiving the most funding. Additionally, 15212 was the most funded zip code, and Allegheny County was the most heavily funded county.

Funders in the region should diversify their donations in terms of UN SDGs and SDOHs that are impacted. Those that live in the region have needs in all of the UN SDGs and SDOHs, and it is important to make sure that all of those needs are being met. Future case studies could compare the data collected for this report to other publicly available data from resources, such as MySidewalk or the Community Impact Dashboard from the Forbes Funds' website, to identify overarching trends or discrepancies. This work can help bridge some of the gaps in the nonprofit ecosystem in terms of both funding and need.

Thinking Through Leadership for Nonprofits

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Organizations of any size, status, or brand must deal with challenges that are systemic, personnel-related, or process-oriented. Several of the selected challenges in the nonprofit sector revolve around issues that drive change, are particularly aligned with the mission, create the desired culture, and understand the impact on people (Buccino, 2017). The improvement to nonprofit challenges requires a responsiveness that originates with leadership and leader preparation.

Leadership that serves and transforms orchestrates as a best practice for nonprofits. In organizations, leaders provide direction for tasks and direction for people. In nonprofits, service for people can be prioritized through servant leadership, a practice that seeks to serve first (Carroll, 2006). This is suitable for nonprofits because they are in position solely for purpose, and the purpose aims to service people. In nonprofits, an alliance whose stewardship only advantages the purpose, leaders are inspired to take ownership of that purpose. This type of leadership allows the influenced to be transformed by the thought-provoking values that are also shaping the organization (Eisenstein, 2021).

Both servant and transformational leadership can provide productive focus and solutions for the challenges of nonprofits. The first acknowledged challenge revolves around issues that drive change. Although this change is initiated by issues, there is no differentiation, regardless of the issue; the issue ignites change. This orients the focus to change, and this is what the nonprofit leaders will need to become skilled at for a response.

Change is constant yet unwelcomed except in crisis or adverse situations that require redirection. As an instrument, change is necessary for nonprofits and is an expected challenge. The Harvard Business School notes that organizational change can be adaptive, which is small and gradual, or transformative, which consists of grand and abrupt changes (Miller, 2020). The change management process for organizations has five steps for change: 1. Prepare the organization, 2. Develop a vision, 3. Implement changes, 4. Embed changes within culture and practice, and 5. Analyze the results. The process provides guidance from the beginning to fruition.

In organizational preparation, there are both logistical and cultural preparations when leadership focuses on assisting the employers or followers to recognize the need for change (Eisenstein, 2021; Miller, 2020). This organizational preparation in the change management process shows compatibility with transformational leadership. Targeting individuals with transformational leadership is also a priority in servant leadership where the nonprofit leader centers on people first for the investments in logistics and culture (Carroll, 2006). There is a commonality amongst nonprofits—they serve a need—and people have needs, unlike structures and concepts that do not. This creates a perfect crevice for transformational and servant leadership to best support nonprofit success.

Nonprofit employees are now prepared for change and the next step in the process is the development of a vision (Miller, 2020). This has close positioning to the nonprofit challenge of program alignment with the mission (Buccino, 2017). Visions and missions require one another for nonprofit success. Visions are broad, long-term statements about the nonprofit's future, and missions describe how the vision will be achieved (Panel, 2023). Both a clearly communicated vision and mission to

employees is vital, as it becomes important for the employees to be able to accomplish the goals. Using this, the nonprofit leader will aid followers in discovering how their individual skills will present collective efforts to benefit goal accomplishment. Individuals will also be motivated and understand how to advocate for the defined programmatic endeavors in their challenged mission alignments that are modified to create success.

Shared beliefs and values not only support nonprofit employee motivation, but they also create and develop the desired culture. Creating a culture that the leader desires that is congruent with the vision and mission of the organization, is one of the more challenging movements. Implementing changes provides an opportunity for cultural modifications to be inserted into the routine for new consistencies. With a well-defined vision and mission, the nonprofit leader is able to influence employees as followers, generating the community of cultural similarities that can be preserved throughout the operations of the nonprofit. Again, the nonprofit challenge aligns with the change management process; respectively, creating the desired culture and embedding changes within the practice.

As changes are implemented, transformational and servant leaders that prioritize people will invest in understanding the impact the changes have on people: the people in the nonprofit organization, and the people bring served. All modifications and adjustments will require analysis. Evaluating new measures provides an outline for reinforcing the new adjustments or supplementing prior trends.

The transformational nonprofit leader builds relationships with people as they motivate them to embrace the developed vision. It focuses on empathy and rebuilds or transforms outdated systems, maximizing the individual talents to formulate a comprehensive team effort (Eisenstein, 2021). Transformational leadership is appropriately conceptualized for the existing nonprofit organization facing challenges and requiring change.

Servant nonprofit leaders provide leadership from observations that support incorporating an empathetical and ethical lens in relationship with followers. The servant leader attempts to ensure that the nonprofit members are elevating to their highest individual potential that then supports the advancement of the organization (Carroll, 2006).

As noted, the transformational and servant leadership styles have many similarities; in the lead is the importance of the individual. This lead concept secures a position with nonprofits that are highly reliant upon relationships, relationships within the organization, relationships with the population receiving service, and relationships with donors and supporters for the cause. With this in mind, leaders reflect on the challenges that revolve around issues that drive change, such as program alignment with the mission, create the desired culture, and understand the impact on people.

Most of the dialogue discussed with the challenges in this think-piece is primarily based on change, revered when needed and despised when unexpected. In either case, to lead in this undertaking requires courage, innovation, and sharing the ideals of the vision to create both commitment and culture. All these enrichments for change in transformational leadership look to the associations of people to people. People grow and are enhanced through the efforts and connection with others; this is the interdependency individuals have on and with one another.

It is important to note that transformational leadership includes confidence for the future. In nonprofits, leaders using transformational leadership work tirelessly to accomplish their visionary dreams. This drive is contagious to subordinates and increases engagement and productivity. Feeling unified in the community of volunteers and staff, the team seeks to achieve the common goal of serving those in need (Effective Leadership Styles in Nonprofit Organizations). However, in doing so, transformational leadership can leave employees exhausted from optimistic speeches and subject to the development of blind spots. With the suggestion of adjustments, change is not always welcomed. This would be the same for staff being led by transformational leaders.

Transformational leadership in nonprofits creates shared visions, delivers specific plans, communicates ideas, and improves employee engagement and performance with an organizational culture

committed to effectiveness and efficiency. The price of welcomed empowerment is that the desires may be unbalanced, causing some followers to overextend themselves, leading to personal burnout (Effective Leadership Styles in Nonprofit Organizations). And particularly, when combined with newness, those with longevity in the nonprofits may find it difficult to transition with the changes that may be seen as a threat to what has become customary (Lucas).

Servant leaders are keenly aware of others and their intricacies. This will aid in developing foresight, essential for creating and implementing the plans for change. As the individuals in nonprofits become more self-aware and self-confident as their individual self-work begins with the guidance of the servant leader, their development leads to the flourishing of the nonprofit organization. In nonprofit servant leadership, the term stewardship is suggested to replace leadership because of the responsible care and attention the leader provides for the organization (Carroll, 2006). Stewardship is confirmed to disassociate the task of leadership from its controlling position when the term leadership is utilized, and stewardship provides a focus on the sustainable because it emphasizes supporting the next generation of nonprofit managers.

Servant leadership prioritizes service to others to keep the organizational mission as a goal. The servant leader works to reduce the arduous workload, absorbs employees' responsibilities, and supports the emotional wellbeing of others, all in an effort to make the job easier for workers (Lucas). With all the concern servant leaders show for the needs of their employees, employees may tend to think that the manager is without authority and not seen as an authoritative figure. This lack of authority can demotivate employees as the manager that caters to employees' needs also takes care of everything and undertakes problems, while the employee contributes less effort and thought into resolving issues. Simultaneously the created engagement among members in the nonprofits can also result in reduced rates of turnover from volunteers and employees because of the support felt from servant leaders (Effective Leadership Styles in Nonprofit Organizations).

Servant leaders concentrate on the individual talents of each and building a person's skill set to contribute to employee self-confidence. In this effort, the leader's attention may require redirection in order to detach from individuality and promote focus onto the vision of the organization. If the servant leader is concerned about employees' feelings, the benefits of this concern may often be thought to be more of a priority than the actual organization (Effective Leadership Styles in Nonprofit Organizations). The supportive environment of servant leaders, cultivated through leadership selflessness must be balanced with logistical achievements. Compromising organizational success for the feelings of employees would be detrimental to productivity and lessen the possibility that the needs of others will be met (Lucas). Not one of the leadership styles is better than the other. Flexibility remains important as each leader decides which approach or combination of techniques is best as situations and teams require what is necessary for the support of the community's needs (Effective Leadership Styles in Nonprofit Organizations).

A final thought and key in the sustainability and long-term survivorship of nonprofits is in learning. Embracing the change management process to address the challenges through servant and transformational leadership practices can be effective. This process of success will need to be continuously analyzed for improvements to the results, along with this process of renewal is the need for instructions. Teachings that take advancing learners to the next level, using their talents, through individual support create expansion in the organization and leads to both organizational and individual growth. This commits to the investment of social capital for production and sustainability.

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Human Service Organizations' Responses to the Covid-19 Pandemic: Challenges and Innovative Solutions

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INTRODUCTION

As Covid-19 began to disrupt our communities and daily lives, ushering us inside and encouraging us to distance and limit interactions safely, Human Service Organization (HSO) leaders and their staff continued to find ways to carry out their missions and pivot to support their communities. Yet, as leaders and staff navigated the changing landscape and unprecedented health conditions, in addition to changing public health orders, they also had to close or limit access to buildings, reorganize and adjust their services, start new services, suspend fundraising events, and lost fees for services.

Concomitantly, their communities also experienced economic, health and mental health, and educational challenges, placing residents in more stressful situations and increasing the demand for the services provided by HSOs. In the face of this ambiguity and demand, HSO leaders had to pivot daily, sometimes hourly, to ensure their communities and staff would be safe (Shi et al., 2020). Despite these constant changes, HSO leaders developed and implemented timely solutions to expand programs, maintained their organizational budgets, and supported staff to keep their doors open.

In this study, we examine how HSOs and their leadership responded to the changing circumstances brought about by the Covid-19 Pandemic. Building upon our previous relationship with HSO leaders in the Western Pennsylvania region, we completed 18 in-depth interviews with HSO leaders more than a year into the pandemic to learn how they responded programmatically and operationally as they continued supporting their communities.

THE ADVENT OF THE COVID-19 PANDEMIC

On December 12, 2019, there was a report out of China of an infectious disease, SARS-CoV-2 (Covid-19), about which little was known. By January 20, 2020, the Centers for Disease Control and Prevention reported the first confirmed case in Washington state. Covid-19 cases spread worldwide, and on March 11, 2020, the World Health Organization decreed that the world had entered a pandemic.

The onset of the Covid-19 Pandemic in Pennsylvania unfolded rapidly, with the first cases reported on March 6, 2020. Social distancing mandates were swiftly implemented, starting on March 12 in Allegheny County and four eastern counties and extending statewide by March 16. The governor closed all public schools on March 13, and the first Covid-19 cases in Allegheny County were reported on March 14. Tragically, the first death in Pennsylvania occurred on March 18, followed by the first

death in Allegheny County on March 21. By March 23, the stay-at-home orders issued for Allegheny County and several eastern counties were quickly extended to other western counties. Essential businesses, including healthcare and home healthcare, among others, remained operational ("Timeline of Covid-19 Pandemic in Pennsylvania," 2021). As hospitals reached full capacity, April 1 marked the statewide implementation of stay-at-home orders, and people were encouraged to wear face masks, with all school buildings closed and learning shifted online (Martin, 2020).

Amidst a shortage of personal protective equipment, including masks, for hospitals and essential businesses, the first FDA-approved vaccine, Pfizer, became available on December 11, followed by Moderna on December 18 (Cohen & van der Meulen Rodgers, 2020). However, limited vaccine availability and the requirement for two doses prolonged shortages. To address economic risks and support workers affected by the crisis, the federal government enacted the Coronavirus Aid, Relief, and Economic Security (CARES) Act on March 27, 2020. This legislation included provisions such as direct payments and the creation of the Paycheck Protection Program (PPP), allowing businesses, including nonprofits, to secure loans to maintain employment. Building on the CARES Act, President Biden signed the American Rescue Plan Act (ARPA) on March 11, 2021, expanding unemployment benefits, providing direct cash payments, enhancing tax credit programs, and allocating additional funding for the Paycheck Protection Program (Cohen & van der Meulen Rodgers, 2020).

Simultaneously, as hospitals and other essential businesses faced increased demand, human service organizations also faced adjustments. While human service organizations routinely respond to various social, political, organizational, and personal influences, the pandemic was unparalleled in terms of the scope and intensity of these concurrent forces, and HSOs throughout the United States have documented significant challenges stemming from the pandemic (Kuenzi et al., 2021).

METHOD AND SAMPLE

This study uses a descriptive qualitative design with information gathered from in-depth interviews with 18 HSO leaders in the Pittsburgh area. Organizations ranged from six to 154 years in operation, with annual budgets ranging from $165,000 to $55 million. Of the 18 HSOs, six (31%) had budgets of $20 million and up, four (23%) had budgets greater than $8 million but less than or equal to $20 million, seven (38%) had budgets ranging from $1 million to less than $8 million, and one (8%) had a budget under $1 million. We sought to sample HSOs at different budget levels and found few differences across the findings. We conducted interviews between May and early September 2021. Because of pandemic restrictions, we conducted interviews remotely using Zoom. The interviews lasted about one hour and were audio-recorded, with the transcriptions automatically generated. Four team members read the transcripts after the interviews were completed and the transcripts were checked for accuracy to determine broad categories. Once we defined these categories, the team worked in tandem to clarify key themes by organizing and coding quotes.

RESULTS

Five major themes emerged: initial efforts to maintain organizational functioning, technology adaptations, expansion of services and programs, supporting staff, and budget changes.

Initial Efforts to Maintain Organizational Functioning

The closures came abruptly and swiftly in mid-March 2020. As a result, HSO leaders confronted the challenge of ensuring their organizations survived, let alone how they would operate and provide services. The weekend of the closure, one HSO leader described their feelings as follows:

> I felt like I felt when I was down in Louisiana after Katrina. It's just, everything's coming at you so fast, the need is so high, everything's new and different, and you know, again, I mean we were working, seven days a week, having calls Sunday night to get ready for Monday. Monday comes around everything's changed.

This response, and the responses of many HSO leaders, aligns closely with the findings of Smith (2012) regarding HSO leaders who navigated the aftermath of natural disasters. The onset of Covid-19 meant that HSO leaders needed to be nimble and focus on their mission, community, and staff. (Neely-Barnes et al., 2021). As one leader noted, "It has put me in a position of having to be very creative and very resourceful and really focus on my staff and consumers and families and helping them be resilient through such a difficult time."

While leaders employed timely and creative responses to keep their doors open, they also recognized the need to be transparent with their boards, leadership teams, and staff. Many leaders shared that there was a noticeable and increased need to meet with their boards to ensure more transparent communication and tackle any challenges. As one leader shared:

> We met with our board so often I think we've met with our board- it averaged more than once a week for the first three months. Just to give them a sense and draw them in…we've developed a sort of a smaller working group to guide us. But, it was very difficult in the early days to know what was an operating decision or what was a strategic decision for the future of the agency.

Another shared that they met more consistently to keep the communication lines open and to ensure they were providing staff with real-time updates, "I had a conference with our board of directors, and we just made a commitment to keep our staff structure intact and manage maintaining a staff level the best that we could, and so we did not have to furlough anybody."

With many HSOs closing their physical spaces while also needing to meet with their boards more regularly, many leaders shared that they moved to a virtual format that was also accompanied by an increase in participation, "I would say my board chair and the Executive Committee we communicated, for obvious reasons, more frequently, but those routine meetings on the schedule stayed, and again I had more participation in the zoom meetings." While HSO leaders traversed the ever-changing landscape brought on by Covid-19, they increasingly relied on available technology. However, with the shift from in-person to virtual came new challenges as they worked to keep connected both with staff and the community.

Technology Adaptations

As HSO leaders and their boards adapted to technological changes, their staff also worked to adapt to the new landscapes to provide essential services. Initially, some agencies lacked the required technology, compounded by the need to train staff to use the equipment. As one leader stated:

> We basically, you know, had to purchase laptops for some of our staff that were working remotely. Everybody had to be retrained on certain things… There are obviously always technological gaps and things like that, but we're at the point now where staff have access to the tools.

At the same time, HSO leaders made efforts to increase client and community access to their services. For example, they discussed processes that shifted to allow individuals to continue engaging with and access services. They noted that while their staff had met with clients at the office and in the

community prior to Covid-19, the shift to fully remote work meant updates to network and software accessibility became more apparent:

> We went paperless, so there was a full paper process. You had to like come and be there and fill out the stuff for hours. We don't do that anymore… We've always, kind of, I don't want to say been remote, but we've always had people doing work in the field and remotely. Because it was affecting one or two people at random, we weren't addressing issues. Now that it's, you know, affecting everyone we're like, "Oh wow, the VPN is that slow, that's a problem." Covid, so, it's, you know, impacted that.

Another challenge for many organizations was ensuring that staff working from home could easily communicate with other staff and provide remote services to their clients. They recognized that they would need to depend on how technology could keep staff engaged with each other and their target populations. One leader noted, "I think what Covid has shown us is that just because of circumstances, that the world doesn't have to shut down and technology helps us keep things moving forward." Technology and social media applications such as Facebook or YouTube offered another way for staff to work with their consumers, as was illustrated in programs focused on adolescents:

> I will say I know that we met our service users where they're at. So, a bunch of our like youth coaches have professional Facebook accounts now…because our users already knew how to use those platforms. The other thing was really useful because our mission is focused towards youth.

And:

> We have an early childhood program, which is basically a preschool. A teacher took to YouTube, and then you know, with her little class, she became quite the YouTube hit, and she would be doing interactive activities as far as reading and doing demonstrations those things.

In addition to using social media platforms, HSO leaders noted that even though some classes and programs became virtual, they still saw consistent attendance. As one leader stated:

> What was surprising to me, but I guess it shouldn't be, is the number of students that were on when we were doing things virtually, and we were shut. We maintained pretty consistent numbers as if we were in person, and we pretty much ran at full capacity in all of our classes.

Further, HSOs partnered with their staff to adjust their programming from intake to outreach and implementation so that programming became easier to access:

> For those programs that were in person, you know, case management type or financial assistance, I mean, we quickly adapted those, too. I mean, fortunately, most folks have some type of handheld device 'okay, take a picture of your utility bill. text it to me, fax it to me, email it to me. Covid We can process things that we learned quickly so that you know we didn't have to do everything face to face with you sitting across the desk from me. And so, in that context, we did those things remotely that made it in some of those programs…easier, a lot easier.

These quotes illustrate the experiences of HSO leaders and their staff as they ran into unforeseen technological challenges but were able to adapt quickly and bring themselves up to speed. They also

highlight how even though disruptions to the traditional social work engagement model occurred, they continued to serve their missions and communities in both new and familiar ways.

Expansions to Services and Programs

Similar to the survey findings from the Pittsburgh Foundation (2020) report, HSO leaders shared how their services and the emergent needs brought on by Covid-19 increased demand. HSO leaders discussed how they traversed this new landscape by adapting or expanding current services or implementing new services and programs:

> So, we bought plexiglass screening around everyone who interacts pretty regularly with the public. In our food pantry, we put up tents outside so that people could stay warm or dry, or, you know, away from the elements during Covid. We would, you know, we moved all of our produce and everything outside; they could take as much as they wanted. We prepackaged boxes.

HSO leaders responded and expanded services based on emergent needs directly brought about because of Covid:

> The folks that we work with, the vast majority, are undocumented, and so, they didn't qualify for unemployment, they didn't get the stimulus like none of that happened. And so immediately, we saw the need for food, there was so much food insecurity, and so we became a food pantry within the first couple months and started feeding thousands of people… The other thing we did was a one-time $700 cash payment for folks who didn't qualify for the stimulus. And then, what ended up happening is that we saw people that were testing positive for Covid and still going to work because they would lose their jobs, or if they literally didn't work, there was no food on the table. So, what we did, then was we, if you tested positive for Covid and you showed us your positive Covid test we would give you $500 in cash so that you could quarantine for those 10 days. And we would supply you and your family with groceries for two weeks, so that was our other way of helping motivate people not to work during that time.

The Covid-19 Pandemic exacerbated existing social needs and so agencies expanded their services. As noted by one leader:

> Obviously, some of our programs have been expanded in reaction to Covid. I don't think they're going to shrink because the need is there; it was just this really highlighted the need… We actually ran a Covid shelter that the county gave us so that was one of the short-term programs that we opened it, and we closed it.

HSO leaders also discussed how they partnered and collaborated with community organizations and served as conduits between their service populations regarding general Covid-19 information and specific information about the vaccines and testing as a vehicle to keep their communities healthy, safe, and informed:

> We moved into Covid testing with partners, and we've been a vaccination clinic for almost six months now… So, instead of our gyms being used for basketball, they have been used for Covid testing or vaccination.

And:

We have our health care program, which you know we were really trying to get as much information about Covid out as quickly as possible about the vaccine. Now we hope you can get your vaccine at [organization], you can get tested for Covid at [organization]. We have taken mobile units out into farms to vaccinate people. We have been all over Southwestern Pennsylvania vaccinating people.

These quotes reflect the myriad of challenges that HSO leaders navigated to support their service population. Nevertheless, these organizations recognized that a new situation had emerged and adjusted in ways that were beneficial to their communities and service populations. Being vested and embedded in their communities, they could adjust their programs, expand them, and develop new services.

Supporting Staff

One HSO leader's mantra was "increased productivity, increased commitment, and increased dedication of our entire staff." HSO leaders explained that while programs were modified and expanded based on community needs, they emphasized how valuable and steadfast their employees were during this time. They recognized that many of these changes would be intimidating and cause new burdens to their workforce. However, they also acknowledged that their staff were navigating the ever-changing landscape to keep themselves and their families safe while serving their communities.
One strategy was to encourage staff to take time off from work. For example:

Encouraging staff to take mental health days; we have a pretty generous sick time benefit, and we said you don't have to be physically sick; you know if you need to take a mental health day and use that benefit go ahead and do that. So, we were just trying to encourage people to take vacation days, even though people felt like, you know, "Where am I going to go to?" Still, take those days just to disconnect from work and kind of recharge.

Another strategy was to extend family leave benefits:

We actually created sort of an informal leave that went beyond the FMLA days. So, we did have some staff on extended leaves of absence that just either had family issues that made it difficult for them to come back or they suffered from some mental health challenges or other challenges.

Finally, another way leaders supported their staff was to integrate self-care into the workplace.

I mean, I never would have thought we would start management meetings with guided meditation, but we start management meetings, sometimes with guided meditation. It works, and I think it's really special to begin to incorporate that.

To acknowledge the work of the staff, some agencies gave large raises. Furthermore, additional staff was hired to reduce workload: "And folks knew that one of the main reasons that we were hiring more people was so that a lot of what was on their plate would be taken off. So just really trying to help support them."
HSO leaders employed varied procedures to support their staff. For example, some went beyond what is already offered by creating a leave policy that allowed staff to step away if they needed to keep themselves and their family safe. Additionally, HSO leaders were transparent with staff that they needed to take time off and provided them with higher wages as a thank-you for weathering the storm

with them. However, while leaders were finding ways to support and validate their staff, they and their staff were also living through much social unrest and an election that polarized the country, as illustrated in these two comments:

> The pandemic coincided with some of the most insane politics in American history. And that was also a source of massive stress for people…those couple of weeks when no one knew who actually won the election. You know, people were pretty weird in November. You know, the handling of the pandemic by the Trump administration…had a major impact on people's work morale because, you know, how do you pick an issue that we're going to work on?

And:

> We started a DEI Task Force, and we have been doing some work on the culture of the organization and diversity and inclusion. We tried to pay some attention, especially to George Floyd, because half of the kids in our group homes are African American, so we really wanted them to understand or to feel comfortable talking about a pretty momentous occasion in our country.

Thus, HSO leaders recognized that their staff were witnessing a once-in-a-lifetime experience that caused undue harm to their staff. With HSO leaders stepping up to provide space for their employees, they also supported their communities in navigating these stressful events.

Budget Adaptations

As HSO leaders sought to protect their staff and expand services and programs to support their service populations, they also employed financial measures to ensure they could meet their costs. For example, leaders shared how they worked diligently with their boards to control costs:

> Well, immediately, we employed some financial controls because, again, not knowing what funding streams are going to look like, particularly in the nonprofit sector, so you know, I think we did our part to hold the bottom line.

Another strategy was to free up funds from programs put on hold because of the pandemic:

> Here were increased expenses…with, you know, the PPE. We purchased laptops, and we had to increase our internet connectivity capacity, so almost everything had a new and different cost. In the long run, where I might have this new cost, I might also be saving because now I didn't have to pay the school district bus transportation because they weren't transporting the kids for me anymore, so you know you could trade off some things.

In addition to employing proper financial controls and freeing up funds, HSO leaders were also facing new challenges related to fundraising. With all in-person fundraising events canceled, they initially worried about being able to have the diverse funding streams needed to keep their organizations running; instead, fundraising did well:

> We had a very good financial year in 2020… an all-time record in individual contributions to the organization. Typically, contributions to us are counter-cyclical, right? When the economy is bad, and there's news about lots of people being hungry, people give more to us and less to the art museum. And that happened to a greater extent than I've ever seen during the pandemic. A

number of major donors that we had never heard of or contacted before gave us substantial one-time gifts that we hope they will renew and gave us the opportunity to get to know some new donors.

Even though HSO leaders were understandably nervous about their financial well-being, many organizations fared well without fundraising events. However, they were still concerned about what it would mean for them in the future, with many donations being one-time gifts from new donors. While they managed these new relationships, their relationships with foundations remained constant, with foundations recognizing they were supporting organizations during unprecedented times:

The foundation community here was phenomenal at stepping forward and saying listen, these are unprecedented times. We know you have a grant from us. It's to do x, Covid, and z. If we need to change the parameters of that grant, let's have that conversation.

Further, how they expressed the need to the community and the subsequent response from the community was strong:

And the community recognized we needed to just get some money into the mix to help. Individual donations again, people really, really responsive. Not a ton of huge checks, but we got a lot of smaller checks that, at the end of the day, provided relief for people needing it.

And:

We have seen the generosity of this community. If I'm effective in explaining what need looks like, the pandemic gave me a great opportunity to shine that light on, "This is your neighbor who was working at Eat and Park as a manager and just doesn't have a job right now, and they need to still pay their rent." Covid…gave me effective ways to communicate that this is also a community that has the wealth to respond, and they've been very generous, so we've been blessed, so, yes, we did see increases on expenses for a lot of things, but we saw the offsets and then some on the revenue side.

Overall, HSO leaders could adapt their budgets and maintain their bottom lines despite facing unprecedented challenges due to Covid-19. In addition, the larger community could easily connect with and understand the need to donate; foundations were flexible, and they could keep the organizations and staff afloat even without fundraising events.

CONCLUSION

The impact of Covid-19 on all organizations was and continues to be evident. However, the effects on human service organizations were particularly salient. HSOs and the leaders and staff that keep them running are seen in their communities as unwavering and consistent, and with the influx of hardships that washed over their service communities, they had to adapt quickly. HSO leaders and their staff worked to expand or bring on new services rooted in their missions and community needs. Additionally, HSO leaders had to address budget fluctuations, work tirelessly with their boards, support their staff, and address technological changes to keep their doors open, virtually and in person, to provide needed support. Now that the federal government has declared an end to the COVID-19 pandemic emergency, future research should examine what lessons from the pandemic period have carried over to the way the organizations operate.

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And the Award for Best Supporting Role Goes to… Nonprofit Intermediaries!

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In a 1970 novel, *The Fifth Business*, Canadian author Robertson Davies drew his title and narrative from an archaic stage term referring to characters who, without leading roles, set a drama in motion, bring it to resolution, or both. They also often provide an outside perspective.

Our organization's work is a little like that. We're a nonprofit intermediary in public education. As such, we're never the stars in our work—educators, their districts, schools, and students are—but we're crucial as catalysts and conveners, and supportive in other critical ways.

Because they can help both grant-makers and nonprofits with myriad challenges, it's worth looking at the role intermediaries play now, how they came to be, and how the services they provide have changed and continue changing.

It's important to say upfront that the handful of references we've come across to their histories are both sketchy and somewhat at odds. Definitions for intermediaries also seem to vary, as do even the names we give these organizations.

About one thing, however, there seems to be a growing consensus. Once considered by many as mere staff-extenders for foundations, nonprofit intermediaries have increasingly become recognized as strategic players and partners that can add value in multiple ways.

Both PEAK Grantmaking, a community of philanthropy professionals, and an essay on power and the changing role of intermediaries that appeared in *Nonprofit Quarterly* take note of the evolution, and our organization's more than 35 year history attests to it (David, 2021). A recent project that we performed involving six school districts as they emerged from the Covid-19 Pandemic also illustrates many of the services we can provide. More about that initiative further on.

Terminology for intermediaries varies as much as their roles. Common descriptors include philanthropic intermediaries, re-granters, fiscal sponsors, umbrella organizations, boundary spanners, and backbone organizations. Generally speaking, the functions they perform seem to fall into three categories, sometimes overlapping:

- Channeling funding to grantees and providing oversight, philanthropic intermediaries, which sometimes exclusively perform this role, also often bring grant-makers knowledge about services available in different geographic areas, help identify nonprofits performing specific charitable missions, and, more recently, provide technical expertise and strategic support.
- Providing operating structures along with expertise for smaller nonprofits that can't afford them, and/or serving as harnesses for multiple nonprofits pulling together toward a single goal that none on its own could achieve. These are functions often ascribed to backbone and umbrella organizations.
- Acting as service organizations themselves, raising funding and providing knowledge, resources, and services to nonprofit clients of their own.

THE EVOLUTION OF INTERMEDIARIES

Nonprofit intermediaries originally were on-the-ground agents for funders: whether foundations, individual philanthropists, or pools of small donors. They often identified organizations performing the specific charitable missions that funders wanted to support, distributed funding, provided oversight, and sometimes even administration. Effectively re-granters back in the day, their work has changed considerably.

By some accounts, the roots of intermediaries go back as far as the late 18th or early 19th century, when so-called voluntary associations formed to collect funds from donors and allocate them for specified purposes of mutual interest (Hall, 2006).

United Way, founded in Denver in 1887, and the National Urban League, founded in 1910, also prefigured some of the roles intermediaries would eventually play, as did community foundations, like the Cleveland Foundation, which banker Fred Goff founded in 1914 and promoted as a model to other cities.

Despite their deep roots in our past, however, a history on Philanthropy New York's (2008) website suggests that the term nonprofit intermediary didn't come into use until much later, in 1979. At the time, foundations in New York City founded Philanthropy New York to build capacity for grant-makers, and the Ford Foundation launched the Local Initiatives Support Corporation (LISC) with similar intent.

From there, intermediaries began taking on increasingly supportive and strategic roles. Some, like ours, even began to function as service organizations, raising funds, building in-house expertise, and supplying resources to client organizations: in our case, K-12 schools, though in most instances, other community-service nonprofits.

Turner et al. (2012) outlined several important ways intermediaries had, by that time, begun to add value. It focused on an economic development initiative the Greater Cincinnati Foundation undertook that enlisted multiple backbone organizations, a term the authors applied to intermediaries implementing strategies aimed at collective impact. A summary of contributions these backbone organizations made included:

- Guiding vision and strategy,
- Supporting aligned activities (among themselves and among partnering organizations),
- Establishing shared measurement practices,
- Building public will,
- Advancing policy, and
- Mobilizing funding.

Because of these contributions, the authors found, intermediaries helped the whole become greater than the sum of its parts. Community Development Corporations (CDCs), in general, illustrate the same point. As backbones, they leverage the capabilities of multiple partners—both nonprofit and for-profit in some cases—with different expertise or locations to achieve greater collective impact, or impact across a wider sphere.

Other accounts of intermediary roles offer a litany of additional ways they can improve results both for grantors and grantees. These include, but certainly aren't limited to:

- Making vital connections with prospective grant recipients that are small or under the radar,
- Extending a funder's reach,
- Creating cross-sector partnerships,
- Mapping strategy for grantors working in unfamiliar sectors or for grantees,

- Designing or managing programs,
- Bringing knowledge and technical expertise in various specialties,
- Expanding capacity for funders and/or grant recipients,
- Ensuring accountability,
- Facilitating systems change,
- Convening stakeholders, and
- Advocacy.

Importantly, there also is thinking about how intermediaries might help funders advance shared power and greater equity (David, 2021).

According to the MacArthur Foundation (2024), which sums up the evolving role of intermediaries from its own experience: "We often make grants to intermediary organizations to take advantage of the knowledge, connections, networks, expertise, and resources of these entities."

Similarly, as part of a survey, David Wertheimer, Deputy Director of the Bill & Melinda Gates Foundation's Pacific Northwest Initiative, told Grantmakers for Effective Organizations (2013) that his organization works through intermediaries like Building Changes to fight homelessness in its region, "because we're not an operating foundation, so we don't, by definition, roll up our sleeves and do the work ourselves."

"We have to figure out how best to engage with the community to promote systems change," Wertheimer added. "You can't just ask different systems to change. A change agent or boundary spanner is essential—resources must be targeted to the work of making change happen. That's the essence of Building Changes' intermediary role."

In the same vein, but closer to home, who could even question the value of the intermediary role the Greater Pittsburgh Community Food Bank plays in fighting hunger? It raises funds, solicits and stores food donations, and advocates on behalf of food-insecure populations across our region, all the while working efficiently to build capacity and distribute resources through a network of neighborhood food pantries.

Although the analogy isn't perfect, we play a similar role in K-12 education.

WHAT THE CONSORTIUM DOES AND WHERE IT FITS

The Consortium for Public Education began in 1987, with support from the Heinz Endowments and the Allegheny Conference on Community Development, to bring added resources to school districts in the Mon Valley. Initially focused solely on the McKeesport Area School District, we quickly expanded to serve more than 20 districts as the Mon Valley Education Consortium (MVEC).

At the time, Mon Valley communities were crumbling amid a wave of steel mill shutdowns that also ravaged school districts' tax bases. As a result, some schools couldn't afford books or building repairs, much less professional development for their educators or opportunities that students in more affluent communities took for granted.

MVEC brought expertise and resources that none of those districts could alone assemble or afford. Instead of struggling on their own, they had the Consortium as an advocate and change agent to help level the playing field for them and their students.

At the outset, we launched the Great Idea Grants Program to provide small awards to teachers trying to engage students more deeply with innovative classroom projects. To create buy-in for our work and offset community malaise, we organized local School Action Committees to review their applications and make the awards.

We also brought strategies for leveraging existing resources. Within each district, for example, we organized teams and facilitated discussions aimed at making collaborative leadership a means of

expanding capacity. We networked the different districts as well, helping them collaborate on improvement projects and, by doing so, expand capacity in yet another way.

Among early initiatives, we organized a joint in-service day to expand professional development for all districts' educators. As part of it, teachers and administrators themselves shared best practices through presentations that non-presenting peers attended. Participants traveled outside their own districts, a learning experience in-and-of itself for many educators, to take in ideas and practices peers elsewhere had successfully implemented and take them back home.

To offer opportunities for students—the real-world exposure and experiences they need to see the relevance of their learning and the possibilities ahead of them—we enlisted partners from business, community organizations, and higher-education to host site visits and engage in projects.

These partners themselves also often realized benefits, from visibility with the next generation of workers, to opportunities for building skills in prospective recruits. As a result, these collaborations gave us stature among those interested in early and novel ways to support workforce development.

Over the years, our work has expanded to touch as many as 85 districts annually and take in scores of business, community, and post-secondary partners. We've helped districts address challenges ranging from easing the transition students make from middle school to high school, the period when students are most at risk for dropping out, to helping design supports and practices for students to plan their own futures, which research shows can get them to take ownership of their learning and set them up for future success.

We have the proverbial small, but mighty staff. There are 11 of us, many with classroom experience and individual expertise, ranging from workforce development and public policy to nonprofit management and communications. We draw on their talents to offer professional development, facilitate systems change with educators, schools and/or districts, and continue creating cross-sector partnerships. We also unfailingly advocate for equity among districts and among students themselves.

CHANGE AGENTS AND THE INGREDIENTS FOR SYSTEMS CHANGE

In the 18-month project we did with school districts as they reopened from pandemic-induced shutdowns, we brought to the table many of the assets for adding value that nonprofit intermediaries have been adding to their toolkits and scored a win all ways round.

We orchestrated a Collaborative for Student Success (CSS) among six districts. All served significant numbers of students from low-income families and represented a cross-section of urban, suburban, and rural communities in Allegheny and Westmoreland counties. Participants included Burrell, Cornell, Deer Lakes, Greensburg-Salem, Jeannette City, and Woodland Hills school districts.

As they put the pandemic in their rearview mirrors, CSS helped these districts regain footing, refocus their priorities, and share best practices. Aiming for systems change, within and among their districts, CSS focused on improvements in three focus areas:

- Strengthening family engagement,
- Increasing future readiness among students, and
- Improving school design.

Although we added value in most of the important ways intermediaries can, an outside evaluation from CSS (2022) underscored several:

- Creating a cohort around common concerns,
- Maintaining accountability, and
- Creating community connections.

The value educators gain from working in small networks or cohorts cannot be overstated. Day-to-day these professionals work in silos. Cloistered in their own systems and schools, they often don't collaborate across classrooms and offices, much less districts.

Having worked with many cohorts and networks over the years, I can tell you educators often are surprised to find that peers in other districts face challenges identical to theirs; they're also thrilled to learn how other districts solved them and take those ideas back to their own.

Getting perspective from outside their districts can be game-changing. We know this not just from our evaluation, but because educators tell us so. Following our work with CSS, for example, almost every participant did. One administrator summed up many of their comments well:

> "The value of working together has been huge. It's the sheer level of knowledge in the room when we get together. You've got decades and decades of experience in the room, as well as the fact that it's a very solutions-oriented group."

As much as educators need to work together, they also often, as a group and individually, need an outside agent urging accountability. Like most professionals, they're accountable for so many other things daily: in their case hundreds, if not thousands of students, their learning, and a safe learning environment. They're also accountable to parents, administrators, and taxpayers, and plagued daily with figurative fires to put out.

We structured CSS group meetings to include team presentations, staff presentations of research, and feedback from peers. Individually, teams were expected to turn those and their own learnings into action plans. We kept the teams on track with monthly check-ins, frequent communication on next steps, clear expectations for meetings, and staff support as individual district teams designed plans for improvement.

If educators have little interaction with peers outside their schools and districts, they have even less with the businesses and organizations outside education. Many educators have never worked outside their fields and, thus, may also have limited employer and community networks. Like having cohorts to work in, it is one of the biggest reasons they need intermediaries.

Connections outside their schools are vital for students. Without connections to business and community organizations, kids in many districts, particularly those in lower-income communities, have few ways of understanding the career possibilities that lie ahead of them or the learning and skills they need to pursue these pathways.

The improvements these three ingredients—cohorts, accountability, and community connections—can bring about never ceases to inspire me. In the three focus areas we pursued—strengthened family engagement, increased future readiness among students, and improved school design—here are just a few that hint at the changes the CSS work portends:

- One district, where dramatic expansion of the ELL (English Language Learner) population had taken administrators by surprise, implemented a language tutoring program for parents to better engage families. Classes began last fall.
- In a district where educators recognized they needed alternatives for some 75% of graduates unlikely to pursue college, a community connection we made evolved into an internship program and a recruitment "signing day" with fanfare usually reserved for college football.
- A district whose standardized test scores failed to measure up to report card grades began implementing standards-based learning and assessment to ensure greater fidelity and consistency of content taught in classrooms. Instead of multiple-choice tests, the district is now adopting formative assessments, projects, portfolios, and other options for students to demonstrate proficiency.

Of course, that is just a sample. You can learn more from a playbook we created so that other educators can find ideas to borrow or strategies to replicate, just another way intermediaries can add value to advance "systems change" through small projects (Consortium for Public Education, 2022). You'll also learn more from the playbook about the true stars of CSS. Like *The Fifth Business,* we of course, played only a supporting role.

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Communities in Collaboration: The Past, Present, and Future of Collaboration Among Allegheny County Community Development Corporations

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Persistent poverty conditions limit a community's ability to maintain both a robust economic base and strong community ties due to the lack of economic opportunity and presence of blight, all of which can make community members less interested in shepherding future improvements. In the 1960s, Senator Robert Kennedy proposed the creation of community development corporations (CDCs) to spark community-based economic and social programming that would improve neighborhood conditions ("Community Development Corporations (CDC) Partnerships," 2020). Typically, they are organized and staffed by community members and include community representatives from other civic institutions on their governing or advisory board (Erekaini, 2014). CDCs often collaborate with other nonprofit, government, and corporate partners to host programs and engage in community revitalization efforts. Because of their close ties to residents, CDCs are uniquely positioned to respond to their community's specific needs; however, they often struggle to access sufficient resources, a conflict that could potentially be resolved by greater instances of collaboration among regional CDCs.

WHAT IS A CDC?

Originating during the 1960s Civil Rights Movement, CDCs developed to fight "redlining," the systematic denial of services on a racial basis, and community disinvestment, with early leaders having backgrounds in community activism. CDCs are 501(c)(3) organizations that exist to support the revitalization of the neighborhoods in which they exist, and they now focus on facilitating housing development, facility renovations, and employment and community development programs ("Community Development Corporations (CDC) Partnerships," 2020). According to Cullinane (2013), as 501(c)(3) organizations, CDCs incur several benefits, including:

- Exemption from federal income tax;
- Tax-deductible contributions;
- Possible exemption from state income, sales, and employment taxes; and
- Tax-exempt financing.

Community revitalization efforts affect the well-being and civic behavior of community residents, and they can empower citizens to become more self-sufficient while promoting economic growth among local businesses (Green & Haines, 2008; Kretzmann & McKnight, 1996; Page-Adams & Sherraden, 1997; Tigano, 2013). In addition to the activities previously mentioned, they tend to drive the branding of a community via new logos and signature events, thus leading to more attention from local government and potential funders to support revitalization efforts (Thomas, 2021).

Two primary models dominate the scholarly conversation on how CDCs should operate: a place-based approach and an asset-building approach. Traditionally, when they originate, CDCs will conduct a needs assessment that identifies the community's strengths, weaknesses, and existing issues (Kretzmann & McKnight, 1996). Unfortunately, this method can make communities reliant on professional assistance, which compromises the area's development and makes it harder to authentically engage residents in the revitalization process (Green & Haines, 2008). On the other hand, asset-building utilizes community assets to identify the area's strengths and weaknesses as contributions to the strategic planning process (Green & Haines, 2008). Tigano (2013) defines assets as "gifts, skills, and capacities of individuals, associations, or institutions within a community," which recognizes that all community members have something to contribute to revitalization and redevelopment, as they can include funding, labor, or talents (p. 1).

Local institutions, like businesses, hospitals, and schools, serve a critical role in the successful revitalization of a community, as they are the "most visible and formal part[s]" of a community's foundation and culture (Kretzmann & McKnight, 1996, p. 26). Their resources are important aspects to consider when redeveloping an area, though it can be difficult to assign responsibility to these groups (Tigano, 2013). While these local institutions are important partners for CDCs in designing community improvements, there can be unique challenges in communicating and working with them. As budget constraints and limited government funding limit communities' abilities, it becomes imperative that they recognize their existing assets and learn how to leverage them in the redevelopment process (Kretzmann & McKnight, 1996). It is important that CDCs are empowered with sufficient resources throughout the community revitalization process, though, in Allegheny County, the region of focus for this study, there are not currently many avenues for them to collaborate with peers.

THE DEMOGRAPHICS OF ALLEGHENY COUNTY

Pittsburgh, the economic center of Allegheny County, has experienced major successes and challenges in the post-industrial era, beginning in the 1970s. During its transitional period in the late 20th century, many communities in and around the city struggled to promote redevelopment and strengthen other burgeoning industries (Lubove, 1969). However, Pittsburgh had historically prioritized redevelopment initiatives, as demonstrated by the 1946 founding of the Urban Redevelopment Authority of Pittsburgh (URA), the first organization of its kind in the United States. The URA focuses on revitalizing communities through real-estate development, an approach intended to create jobs, improve neighborhood vitality, and expand Pittsburgh's tax base. However, of the several urban revitalization projects undertaken since the decline of Pittsburgh's industrial economy, many were unsuccessful and created additional blight in the targeted communities. As a lack of economic opportunity and degrading neighborhoods led many residents to find homes outside of the city, the tax base continued to shrink, further limiting Pittsburgh's ability to engage in community development (Tigano, 2013).

In the 1990s and 2000s, Pittsburgh experienced a new period of community revitalization as a result of economic diversification, leading to its first instance of population growth since the 1970s. According to the 2020 U.S. Census, Allegheny County is Pennsylvania's second largest county, containing 130 self-governing municipalities ("Municipality Map," 2021). Despite the growing population and historic interest in community development in the region, there are relatively few CDCs in Allegheny County, and it can be hard to locate their leadership and activities reliably. However, community development is not the responsibility of one group. Via partnerships, CDCs can leverage their resources with their peers to more quickly and sustainably improve their neighborhoods.

There are two main organizations who exist to support Allegheny County CDCs and their efforts: the Allegheny Conference on Community Development (ACCD) and the Pennsylvania Department of Community and Economic Development (DCED). The ACCD convenes public and private

sector leaders to set and achieve regional goals in Allegheny County ("About Us," 2022). With input from their Regional Investors Council, they set a work plan every 10 years to shape regional objectives, which is supported by subsidiary organizations who manage advocacy, research, and marketing initiatives. Additionally, the DCED serves, advocates for, and advises communities across the Commonwealth via "strategic technical assistance, training, and financial resources" in order to support "good stewardship and sustainable development initiatives" ("About Us," 2022). The existing hierarchy of CDCs and peer, local, state, and federal stakeholders is shown in Figure 1.

As more CDCs are founded, it is important that they have the tools to collaborate with each other, hopefully minimizing the duplication of their efforts. However, existing barriers prevent them from accessing the time, money, and staff necessary to engage in meaningful and frequent collaborations with peer organizations in the region. Thus, this study seeks to explore the specific barriers faced by CDCs in four communities in Allegheny County and the extent to which a desire for collaboration exists among them.

RELEVANT LITERATURE

Pittsburgh communities need community organizations and professionals dedicated to re-energizing the community and its economy, which CDCs can provide. Despite the growing need, the number of CDCs in the United States is declining, with 15,490 currently in operation, mostly due to a lack of sufficient federal funding opportunities since the Great Recession (Weekly, 2018). CDCs must develop more efficient initiatives, many of which will likely require collaboration with peer community development organizations. There are some general arenas for collaboration in Allegheny County, but its CDCs have not engaged in sustained collaboration, and thus, they face significant challenges to access needed resources. Though current scholarship addresses the challenges facing CDCs, there has been a lack of investigation as to how CDCs can overcome those struggles through collaborative efforts, including the creation of a community of practice (Bratt & Rohe, 2007).

DEFINING SUCCESS FOR AND IDENTIFYING CHALLENGES

CDCs are challenged to develop solutions to issues created by "national or international policies and conditions, such as poverty, racism, and deindustrialization," presenting questions as to how these small organizations can work most effectively (Bratt & Rohe, 2007, p. 64). Abbott (1995) notes that for community development to become a trustworthy approach to fostering greater community participation, CDCs must evaluate what makes a successful project and how to replicate those conditions over time. If CDCs do not understand the factors that contribute to an initiative's success, it will be difficult to prioritize development projects, as without this awareness, they will be challenged to build focused collaboration efforts. Additionally, CDCs must evaluate the incentives provided to different stakeholders via their programming in order to best employ stakeholders' "time, knowledge, money, and expertise within project-oriented partnerships" (Squazzoni, 2009, p. 501). Without a clear understanding of their objectives and ability to leverage available resources, collaboration among CDCs to foster more efficient projects will be difficult to achieve.

As CDCs confront complex problems, they tend to be limited by access to sufficient resources and expertise. Dreier (1996) notes that although the government can help by providing funding, training, and accessible public information, CDCs tend to lack a communal space to share strategies and struggles with one another. He asserts that a CDC's capabilities evolve as it engages in "leadership development, organizational capacity building, education, and consciousness raising," but these processes often require existing community leaders who desire greater involvement and collaboration among partner organizations (p. 127).

US DEPARTMENT OF HEALTH AND HUMAN SERVICES

PA DEPARTMENT OF COMMUNITY AND ECONOMIC DEVELOPMENT

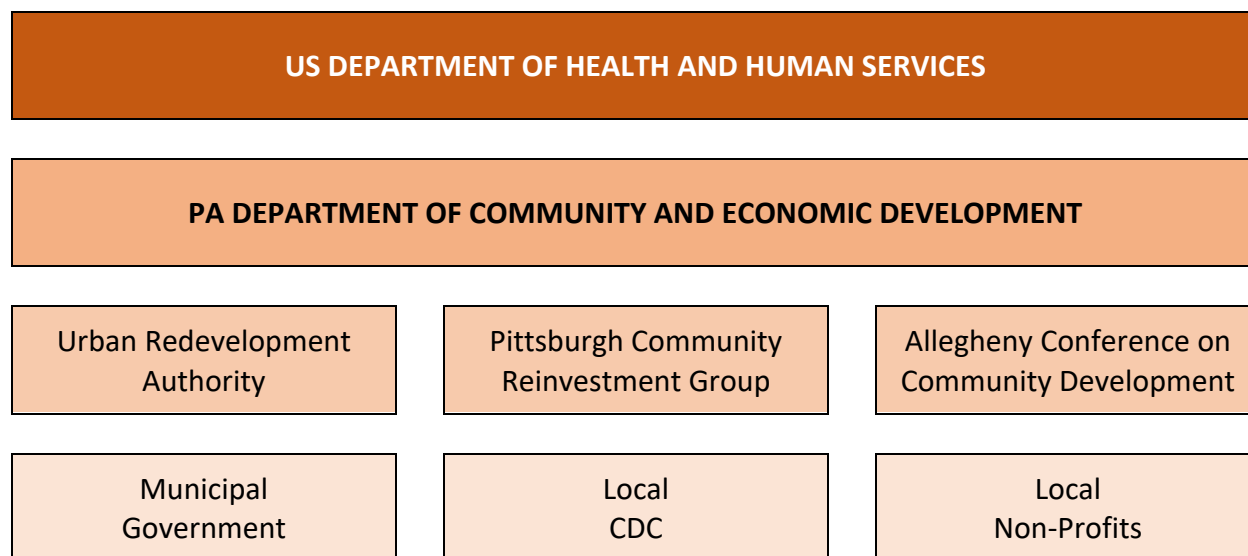| Urban Redevelopment Authority	Pittsburgh Community Reinvestment Group	Allegheny Conference on Community Development
Municipal Government	Local CDC	Local Non-Profits

FIGURE 1. *Intersections of CDC Peer and Support Entities.*

Tigano (2013) notes that individuals with community revitalization experience do not reside in every community, but if they do, they often retain other employment that strains the resources they can devote to revitalization initiatives. CDCs must understand land development, marketing and social media, communications, business development, and finance, among other complicated topics, yet there is a lack of training to help them build expertise. Tigano (2013), Dreier (1996), Abbott (1995), and Squazzoni (2009) all allude to the notion that collaboration is critical to solving the complex problems faced by CDCs, as necessary organizational evolutions can be difficult to engineer unilaterally. Sturdivant (1971), Fraenkel (1977), and Johnson (2004) also address the dangers of failing to focus on specific objectives, a common challenge for CDCs who are often the only community organization addressing a range of issues, further highlighting the inherent difficulty of trying to solve complex community problems. Thus, CDCs should explore the creation of a community of practice, an environment in which they can share best practices and challenges with peers to foster greater efficiency and share scarce resources. In considering this avenue, it is helpful to focus on a specific region in which demographics, regional needs, and existing relationships can be evaluated while assessing whether a community of practice would prove to be useful.

THE CHALLENGES AND OPPORTUNITIES OF A COMMUNITY OF PRACTICE

Despite the existence of the Allegheny Conference, a regional intermediary for public, nonprofit, private sector leaders, CDCs in Pittsburgh struggle to access the technical sophistication, community partnerships, and organizational memory needed to generate sufficient funding and partnerships (Gittell, 1990; "The History of the Allegheny Conference," 2018; "Who We Are," 2021). Collaboration does not look the same for every organization, and organizations providing public goods "may simply need to know what others know in order to achieve their own goals," as opposed to sharing resources to deliver those goods to their communities (Smith, 2016, p. 656). As De Long and Fahey (2000) note, not everything is unique to each community, and they can share techniques, processes, and resources to empower all communities while resolving systemic flaws. However, Silverman (2001) and Martin (2003) discuss how a neighborhood's specific characteristics can influence a CDC's services, thus they

should compare those characteristics with their peers and tailor relationships to suit specific needs. Martin (2003) specifically highlights that a CDC's implementation of solutions is affected by an area's social problems and demographics; however, she, along with Smith (2003), Hemmasi (2016), and Csanda (2009), asserts that communities do not need to solve problems separately to tailor their solutions appropriately.

Hemmasi and Csanda (2009) found that there are productivity and employee satisfaction gains when the perception of community effectiveness is strong, which can be fostered via a community of practice. When CDCs function successfully and foster that strong sense of community effectiveness, Galster et al. (2005) determined that they are better able to connect community actors, develop community leadership, and support the growth of revitalization projects. Additionally, CDCs are often disconnected from funding agencies when determining how to prioritize their initiatives, and collaboration could be helpful in defining how to resolve those differences and fundraise for community activities that may not be financially attractive (Hunt, 2007). However, successful community development initiatives and collaboratives require strong knowledge management skills, especially when digital elements are involved (Kelley, 2011; Zimmerman & Meyer, 2005). While forming a community of practice is an important initial step, Gold, Malhotra, and Segars (2001) assert that an organization must foster incentives to share knowledge while protecting against theft or inappropriate use to successfully implement knowledge management strategies. Furthermore, Eversole (2012) suggests the extent to which an organization can manage its institutional knowledge will affect the health of its relationships. Even in the formation of their community of practice, CDCs will need to collaborate with one another about their knowledge management journey, as public-facing organizations will differ from those of private-sector organizations (Smith, 2016).

Due to a lack of recent, local research, this study is interested in understanding how Allegheny County CDCs can better collaborate through a community of practice, ideally allowing them to provide a space for peer support. Though there are no best practices suitable for every environment, CDCs would likely benefit from easier access to each other's perspectives on the issues facing them in Allegheny County. This study aims to interview the leadership of local CDCs, namely executive directors, to determine what challenges they face in partnering with peer organizations and what types of spaces are needed to do so more effectively. Ultimately, it will propose suggestions for a more collaborative environment among regional CDCs to improve public engagement in community development initiatives.

METHODOLOGY AND DATA COLLECTION

Four executive directors of Allegheny County CDCs were interviewed over the course of one month for the purpose of conducting a cross-case analysis. For this study, executive directors from Coraopolis CDC (Amy Cavicchia), Wilkinsburg CDC (Tracey Evans), Hill District CDC (Marimba Milliones), and Mount Washington CDC (Gordon Davidson) were interviewed about their organization's characteristics, history of collaboration, and recent trends in their collaboration with other CDCs. There were some similarities among them, but the diversity of existing partnerships, the populations they serve, their activities and missions, locations, and community sizes were intended to illuminate the various challenges facing the sector and find trends that are more generalizable to Allegheny County as a cohesive region.

Wilkinsburg and Coraopolis are suburban communities outside of the City of Pittsburgh, while the Hill District and Mount Washington are urban communities. The four areas have populations ranging from approximately 2,000 to 15,000 people with varying demographic makeups. Table 1 (2022 U.S. Census; City of Pittsburgh) displays a comparison of the communities' demographics alongside information on their organizational ages and 2022 budgets.

Table 1
Comparisons of CDCs' Communities and Organizational Makeups

Data	Mt. Washington	Coraopolis	Hill District	Wilkinsburg
Population	10,457	5,559	2,547	14,349
Med. Income	$60,611	$48,101	$25, 646	$37,649
Med. Prop. Value	$123,000	$94,500	$137,400	$93,000
High Sch. Grad	25.9%	93.8%	42.2%	93.4%
College Grad.	34.5%	28.9%	19.1%	38.6%
2022 Budget	~$380,000	~$465,000	~$750,000	~$1,000,000+
Full-Time Staff	1	2	6	6
Organization Age	27 years	35 years	6 years	14 years

Each hour-long interview was done via Google Meet and recorded using Otter.ai, which provided draft transcriptions. Interviews were semi-structured, which allowed for follow-up questions as needed. Each participant was asked approximately 30 questions. Questions were grouped into five categories, each of which contained about eight questions: 1. Personal Background Information, 2. Organizational and Community Background, 3. Current Goals and Involvement, 4. Current Collaboration Efforts, and 5. Growing Collaborative Potential. After each interview, an intelligent verbatim transcription was created, eliminating all "ums," laughter, and pauses throughout the conversation in addition to minor editing that corrects grammar and omits irrelevant words, which was done to make the coding process easier and promote clarity. NVivo was used to code each transcript and conduct a thematic content analysis. The analysis identifies common themes through an inductive analysis, allowing the researcher to assess how and why CDCs were or were not collaborating with one another.

The following assumptions were made in order to best address the research question. First, CDCs in Allegheny County are interested in forming a community of practice and willing to participate in said forum. Second, executive directors are willing to discuss their challenges and envision opportunities with additional collaboration among peers. Third, there will be common themes between interviews that can inform the project's recommendations. Finally, a community of practice is the best model for collaboration among CDCs, as opposed to asynchronous or independent collaboration driven by CDCs. Qualitative data was collected in hopes of identifying the existing needs and desired outcomes related to the formation of a community of practice among CDCs in the region.

RESULTS

Throughout each conversation, it was evident that all participants are committed to doing everything possible to improve their communities, regardless of available resources and despite their organizational variances. Theoretically, there is an appetite for additional collaboration with other CDCs and similar nonprofit organizations, but significant barriers to formation exist.

Personal Background Information

Most participants did not seek out a career in community development. They became executive directors because of their community engagement and connections to neighborhood stakeholders. Notably, most of them did not engage in formal education past a bachelor's degree, and it was uncommon for their studies to consider community development principles. One participant summarized, "I

didn't choose the career. It chose me," which speaks to a sense of unexpected, yet meaningful, commitment to community revitalization efforts. In their roles, they are responsible for the organization's strategic vision, serving as a key stakeholder in their work with groups, and being the spokesperson who shares their community efforts. Even if they do not reside in the community they work for, though many of them do, there is an underlying desire among them to better the neighborhood regardless of staff size, budget, and organizational age.

Organizational and Community Background Information

All the CDCs interviewed regularly compose a strategic plan, typically once every five years, and they appear to have a clear idea of their growth trajectory. In addition to a general strategic plan, two of the CDCs also generate additional planning documents to guide development, marketing, and outreach efforts. Additionally, all four often leverage other community plans to guide their priorities and inform other local collaborations. Unfortunately, there is a lack of available funding for these planning efforts, thus, CDCs typically must choose to devote their scarce resources either to programming or strategic planning. As one participant noted, it is important that they "make sure [their] spending, because it is limited…is more impactful." Boards of Directors are important partners for community representation and keeping the organization responsive to local needs. Unfortunately, boards' training often lacks comprehensive information on their roles and responsibilities, and there are few incentives that outweigh the costs of such training for CDCs. The frequent rotation of staff and fluctuating organizational capacity makes it difficult for CDCs to determine long-term efficacy in the community. None of the CDCs have more than six full-time staff members, and half operate with two or less full-time staff. As a result, significant work is often done by temporary interns and volunteers, thus making it challenging to build institutional knowledge, leverage technical expertise, and collaborate internally due to incompatible schedules.

The executive directors described an indirect approach to collecting feedback and assessing impact with their programs. Often, success is measured by the completion of a project, though more nuanced findings often develop through grant reporting, community outreach, or via interactions during an event. However, they do monitor quantitative metrics like how many businesses opened or closed, media articles they've placed, and people served through their programming. None of the participants reported the regular use of surveys, and their efforts to collect more comprehensive data are complicated by resistance from local government entities to share that information.

Current Goals and Involvement

Each CDC representative discussed partnerships with other nonprofit or government entities, including the Pennsylvania Department of Community and Economic Development (DCED), the Allegheny Conference on Community Development (ACCD), the Pittsburgh Community Reinvestment Group (PCRG), Hilltop Alliance, and the Urban Redevelopment Authority (URA). Of those they regularly interacted with, each executive director reported mostly positive interactions and active participation in DCED's Neighborhood Partnership Program and ACCD's Strengthening Communities Partnership.

The CDCs provided some similar public services, each set tailored to the specific community, though each had at least one program that was unique relative to the other participants. All are engaged in business district development and the community's "Main Street" image, including the improvement of blighted properties, housing support for existing residents, small business owner training and grants, and community identity advocacy, often done through visioning activities, providing gathering spaces, and promoting transparent communication with government agencies.

CDCs also promote cultural experiences via outdoor performances from local musicians, street fests, and home and garden tours that promote awareness about what their community offers. They spearhead conversation with residents, focus groups, canvassing efforts, and discussions with other local stakeholders to identify community needs, and they support underserved communities, such as those in Community Block Development Grant-eligible Census tracts or who primarily speak a language other than English.

Each participant faces various challenges in their work, most of which are related to the accessibility of resources, a lack of issue-specific expertise, and the facilitation of interpersonal relationships with staff members and community stakeholders. While their 2022 budgets range from approximately $380,000 to over $1,000,000, their finances mainly depend on grant funding, though some have also tried to cultivate individual and corporate donors. Because they are reliant on grants, there are often incongruencies between what projects would have the most positive impact on the community and which are most aligned with their funders. Oftentimes, this results in a lack of money for overhead costs and strategic planning efforts in order to focus on projects with more direct impacts.

Conflicts with local governments were also mentioned in each interview, and there was a general sense among participants that the government wants the credit for community improvement without actively contributing. The government is perceived as stubborn when CDCs propose innovations, and thus, there is no confidence in the government being a viable intermediary for fostering additional collaboration among CDCs. The political nature of government presents challenges for sustainable programming, as support may vary depending on the specific elected officials. Executive directors must manage the opinions of local leaders, and thus, community priorities may be misaligned, leading to a lack of coordination between the two groups who are most responsible for successful community revitalization.

Providing sufficient resources is a major challenge for CDCs as staff members develop their expertise and determine how to best provide a wide variety of programming. CDCs are often expected to make major community contributions in technically complex areas, and they are often simultaneously learning how to execute these projects while delivering them. In the early years of their histories, participants struggled to find a sustainable role in the community and determine the best uses of their resources. The community's financial and programmatic needs tend to outpace what CDCs can supply, and there are often few avenues to quickly expand their organizational capacity to deliver additional support for the community. It can also be challenging for CDCs to communicate with the community about its needs, as the participants reported difficulties with mobilizing residents and educating them about the CDC's role.

Current Collaboration Efforts

Though each participant discussed wanting to collaborate more with other CDCs, they mentioned various barriers, including trust, money, time, and outcome quality. The older, larger organizations felt pressure to dedicate resources to their own communities instead of utilizing them to teach newer CDCs, while younger, smaller organizations displayed a greater appetite for learning from peers. Though the Pittsburgh Community Reinvestment Group (PCRG) facilitates live discussion forums for member CDCs, there is a lack of active participation, which limits the discussions' utility. Additionally, the PCRG membership has an annual fee, which is challenging for CDCs with smaller budgets. An expanded role for another organization is unlikely, assuming CDCs would be resistant to paying for an additional, similar membership.

Despite the lack of existing partnerships with other CDCs, all participants collaborate with other local institutions, which involve less direct competition for resources and have more mutual benefits for the involved organizations, especially because of their physical proximity. Though there are unique

challenges to these partnerships, there was an overall positive perspective on these collaborations. There have been previous efforts to create a regional CDC Steering Committee that would better inform CDCs' collaborations in Allegheny County, but there has been no recent movement, and it has failed to materialize any notable outcomes.

Growing Collaborative Potential

Notably, the more experienced executive directors were open to small-scale collaboration by providing template documents or holding short workshops, though only by request of another organization. All participants felt that a structured forum, like a community of practice, would be best executed by a third party, though there was not a clear sense of who that should be. There is a sense that by sharing one's best ideas, an organization risks losing its competitive edge. Concerns were raised about the possibility of someone stealing ideas and using them for personal gain. Similarly, there was not an appetite for resource sharing because it could diminish the quality of programming in each community. Capacity is a significant limiting factor as CDCs have few full-time employees, experience frequent turnover with temporary staff, and are trying to develop a wide array of projects to better support their communities.

CONCLUSIONS

Trust was a core hesitation regarding increased collaborations among Allegheny County CDCs. Participants were concerned that additional collaboration would come at the expense of organizational vitality, as "too much" collaboration could lead to the theft of their ideas and increased competition. CDCs want relatively immediate outcomes, and there is not widespread confidence in delayed reciprocation from their partner. Thus, collaboration must be more than aimless discussion, as a lack of production can lead to frustration and detachment from the collaborative process. As a result, trust should be built progressively and result in clear, positive outcomes for all involved.

Proposals for New Collaborative Efforts

Because of a lack of pre-existing and significant collaborations and the need to maintain desired levels of confidentiality, forming a community of practice among Allegheny County CDCs is unlikely to be the first step in fostering more partnerships, as efforts must overcome the protective nature of CDCs. A contact sheet could be a useful initial project to foster independently formed relationships, but it will likely require a motivated third party with sufficient resources.

It would be wise to explore how CDCs can work as a bloc to engage in collective action. One suggestion was to engage in statewide advocacy to increase funding for programs such as the DCED's Neighborhood Partnership Programs that could mitigate "too much competition with too little money." CDCs want and need more freely available grant funding, and collective action empowers them to engage with government stakeholders to lobby for additional budget allocations toward their goals. Barriers remain regarding the coordination of these efforts, as issues of time and capacity remain with larger collaborative efforts.

A library of best practices and template documents would be a useful resource for most CDCs, unless they are the contributor, but questions about management responsibilities remain. It could reduce the duplication of learning across CDCs and make training more accessible for staff members. Training programs hosted by subject matter experts or the DCED could also generate formal education for executive directors that would enhance their knowledge without demanding a time or resource commitment from more experienced peers. More consistency between CDCs' leadership training and

available technical tools would better align how work is completed. Some participants reported significant challenges accessing modern, reliable technology used by peers and regional stakeholders. Both initiatives are likely best driven by a regional body like the ACCD, the PCRG, or the DCED, as they have wide-reaching relationships that will allow them to raise sufficient funding, operate targeted giving programs, and identify the most needed programming.

Opportunities for Future Research

Moving forward, future researchers will be challenged to create a paradigm for collaboration that is useful to all: one that presents regional, complex issues to further the organizational development and programmatic capacity for more experienced organizations while providing actionable first steps, key learnings, and situational context for less experienced CDCs. Without clear incentives being visible to potential participants, it will be difficult to foster sustained engagement in collaboration among CDCs at any scale. Particularly, future research and efforts to improve collaboration must consider and involve a diverse group of CDCs, as it is not as useful if only particular types of organizations are involved. Additionally, considering how concerned each executive director was about how their time is utilized to advance their organizational objectives, collaborations must save them time in other areas in the near future; otherwise, they are unlikely to view it as a worthwhile investment of their resources.

Regional visioning efforts could be useful to CDCs' understanding of how they can each contribute to pieces of the region's overall economic development, especially compared to the alternative of working together via specific project discussions that may not have enough worthwhile similarities to warrant the respective investment of time and resources by each CDC.

Further investigation of the roles of auxiliary organizations in improving collaboration among Allegheny County CDCs will improve the quality of this research, as well as understanding what disconnects, or parallels, exist between municipal governments and the CDCs in the community to uncover why they experience stilted communication or opportunities for new partnerships on community initiatives. Fostering more collaboration among peer organizations is a worthy objective in the community development field, but it will take significant consideration of individual perspectives on the protection of intellectual property and the presentation of clear incentives to build consensus and improve the effectiveness of everyone's work for their communities.

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DISCOVER Update

Katie Grimm
Sustainable Pittsburgh

BACKGROUND

Community-scale change requires broad stakeholder engagement and a shared narrative that reaches and moves decisionmakers to action. With backbone support from Sustainable Pittsburgh and in partnership with a number of regional conveners, DISCOVER (Defining Intersectional Sustainability to Collaboratively Optimize for a Vibrant and Equitable Region) builds beyond data, creating a shared, inclusive framework for measuring progress, coordinating communications, and driving interventions toward regional sustainability outcomes and policies in Southwestern Pennsylvania.

DISCOVER's goal is to supply the engagement and structure to define regional success and make sure that what gets measured actually gets managed. DISCOVER provides an opportunity for linkages between many other networks. It's a project with the power to strengthen leadership, reinforce and amplify collaborative efforts, and support informed decision-making in our region.

The work of DISCOVER is ambitious, but, we believe, necessary for achieving a shared vision of regional sustainability. The dozens of participating organizations are organized into a steering committee and four cross-sector working groups: Equity, Environment, Health, and Infrastructure. The steering committee is composed of individuals representing the following organizations:

- Sustainable Pittsburgh,
- City of Pittsburgh Department of City Planning (Division of Sustainability and Resilience),
- CONNECT (Congress of Neighboring Communities),
- The Forbes Funds,
- New Sun Rising,
- The Sustainability Initiative at Carnegie Mellon University,
- UrbanKind Institute, and
- Western Pennsylvania Regional Data Center.

OVERVIEW

Our previous contribution to the *Tropman Report* focused on our organizing processes and emerging narratives. This addition offers an update on the project's progress, a reflection on the challenges of convening an ambitious project, a summary of what we have learned, and how we will be applying those lessons for our continued work.

DISCOVER's mission is to create a shared, inclusive framework for measuring progress, coordinating communications, and driving interventions toward regional sustainability outcomes and policies. Our Equity Vision Statement describes a region where all people are enabled and empowered to have their basic needs met, exercise self-determination, and realize their full potential.
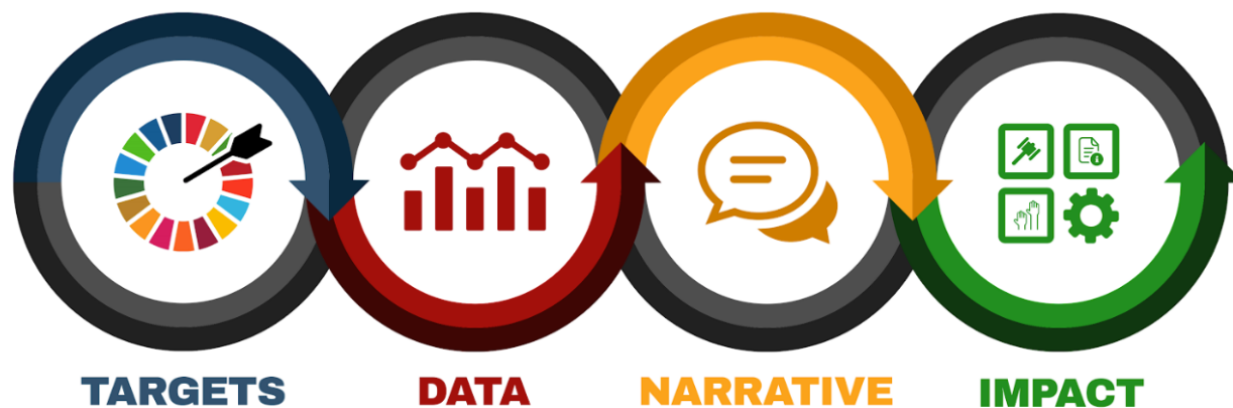
FIGURE 1. *DISCOVER's process.*

UPDATES

DISCOVER's equity and environment working groups met consistently for over two years to identify regional targets as well as regional indicators and data sources. They also began to map the ecosystems by identifying related regional organizations and programs. Simultaneously, a cohort of DISCOVER members also participated in a six month partnership with the global Untitled Alliance in 2022.

Target and Indicator Identification

The two working groups, equity and environment, created 60 regionalized targets from 10 of the 17 United Nations' Sustainable Development Goals (UN SDGs). Figure 2 designates those ten goals in bold. The health and infrastructure working groups convened for the first time to begin their discussions on regional targets in the Fall of 2023, after being introduced to the project in an in-person, full network meeting in March of 2023.

An example of the regionalization process can be found by looking at UN SDG 15.3: Life on Land, which focuses on the sustainable use and management of land and natural resources. The UN SDG text reads:

> By 2030, combat *desertification*, restore degraded land and soil, including land affected by desertification, drought and floods, and strive to achieve a land degradation-neutral world.

DISCOVER's Regionalized Target reads:

> Combat degradation of soil and *landslides* as a result of *increased precipitation and extreme weather events* brought on by global climate change. Restore degraded land and soil including land affected by drought and floods and strive to achieve a land degradation-neutral region.

The italicized words signify the adjustments made by the environment working group to make the goal relevant to our region, since the UN SDG goal emphasizes some things like desertification that are not particularly relevant for Southwestern Pennsylvania. The regional indicators and data sources used to track progress towards the target are: environmental value of land parcels, the Western Pennsylvania Regional Data Center, and the Allegheny Land Trust's GreenPrint.

FIGURE 2. *Development goals targeted by DISCOVER (in bold).*

In this example, the working groups are prioritizing the identification of indicators that we can track with existing data sets. This is about leveraging and better connecting the resources we already have in the region.

Ecosystem Mapping

In addition to regionalizing targets and suggesting indicators, the equity and environment working groups also identified regional organizations and initiatives that relate to each topic they considered. Figure 3 illustrates a sample of programs and activities that were identified for the gender equity goal. Ecosystem maps such as this help visualize who may use this data and how it will contribute to shared success. Maps like this also help make clear the breadth of local work already happening on these topics and draw a link between the similar work of seemingly disparate organizations and clusters: e.g., Partner4Work and the Hugh Lane Wellness Foundation.

The Untitled Pittsburgh Partnership

This unique collaboration between the DISCOVER network and Untitled, an initiative of the Finnish nonprofit think tank Demos Helsinki, aimed to align the learning, coordination, and resourcing of a cohort of Pittsburgh nonprofits. As a result of this imaginative process, participants left with new approaches to systems thinking for more intentional collaboration/coalition building; bold, new ideas; and with a fascinating introduction of the foresight and futures disciplines.
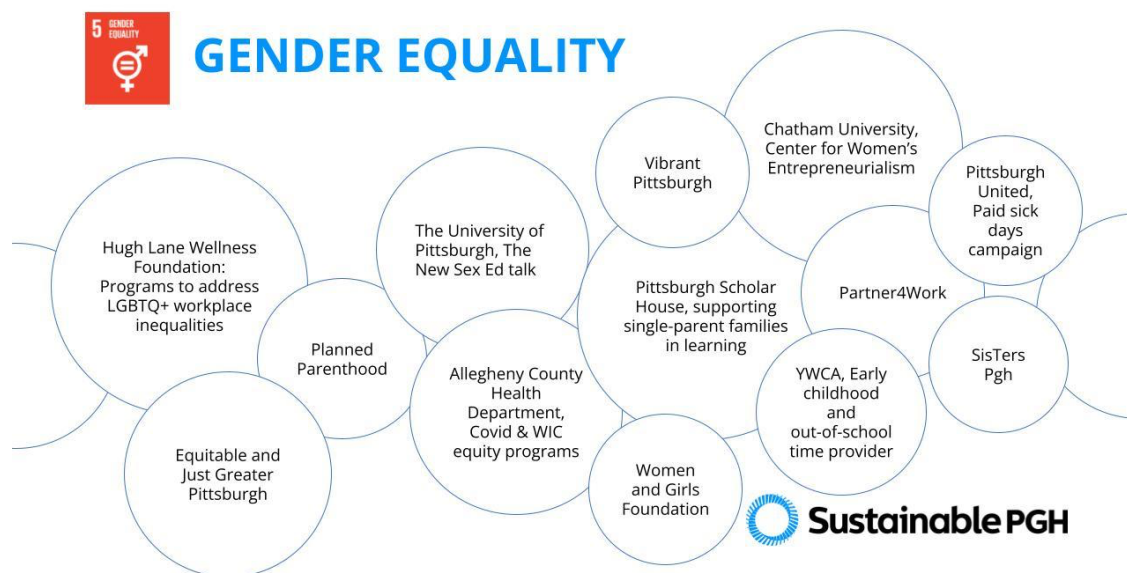
FIGURE 3. *DISCOVER's approach to* UN SDG 5.

The process helped the cohort articulate what is needed to overcome the struggles our sector faces, which will be shared in the next section. The project resulted in the creation of an approach to coalition work as well as identifying what is needed to activate it. Figure 4 conceptualizes how the DISCOVER coalition works to engage the broader network and stakeholders and ultimately produce desired outputs and outcomes.

Network Convening

In March 2023, over 50 individuals representing more than 40 organizations gathered for a full-network convening at the University of Pittsburgh. This was the first time the DISCOVER steering committee and working groups convened in person to discuss regional data and corresponding shared narratives. It provided a space to develop more sophisticated thinking about the Pittsburgh "Tale of Two Cities" narrative. The rich discussions followed group examination of data that explored differences in outcomes for different racial groups, leading to thought provoking examination of how identity may shape perception and experience in Pittsburgh. Similarly, we often hear of Pittsburgh being a hub for "eds and meds" or, in other words, a hub for educational and medical institutions. This is another narrative being used to describe Pittsburgh. Uncovering these narratives helps us better understand perspectives and allows us to shape a story for Pittsburgh that can be shared by all. The meeting in March was a good opportunity for both longtime participants in the DISCOVER conversations through the equity and environment working groups, as well as for brand-new network participants to get familiar with the concepts around regional narrative creation, as a starting point for the next step of the DISCOVER work.

This March convening also enabled participants to have conversations about their observations and approach and helped build alignment with other organizations. We heard from attendees that there was an overwhelming benefit to meet new people and step outside their organizations' silos. Offering a forum for facilitated and organic conversations served as a great starting point to kick off a new phase of more in person, collaborative visioning work.
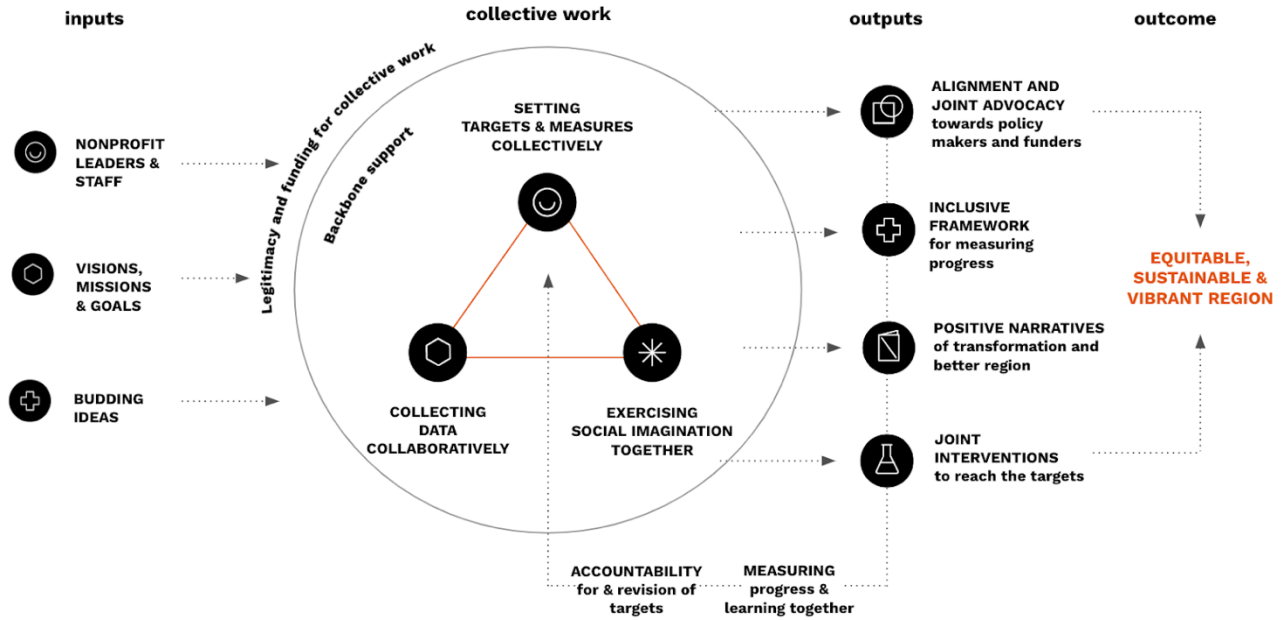
FIGURE 4. *DISCOVER's process for engaging stakeholders in broad networks.*

REFLECTIONS

DISCOVER has faced challenges across the pandemic, some because of the many stressors the pandemic placed on the nonprofit sector, and some due to the nature of the necessary work. The planned schedule became protracted in the face of competing priorities and the demanding schedules of the leaders involved as the project commenced, initially without additional resources. DISCOVER arose not from a top-down call to action, but from a long-observed need: a coordinated, data-informed approach to creating shared narratives for our region and to empower organizations of all kinds to direct their collective energy as part of one ecosystem: a solution to the fragmented approaches that have persisted in our region and exacerbated the problems we seek to solve.

Despite the obvious hurdles to scheduling additional Zoom meetings, starting a new complex undertaking, and building new relationships at a time when in person gatherings were still off the table, participants still showed up with their ideas, expertise, and enthusiasm. In doing so, they not only helped articulate regional UN SDG targets and indicators, they built trust with one another and the foundation for this work.

It is not trivial to convene a network at a reasonable pace and with inclusive consensus on decision making. Beyond the logistical concerns of learning new tools, such as Zoom and Jamboard, we have made an effort to prioritize proactive, informative, and genuine multi-way communication. This has been imperfect at times but always toward a prevailing, critical guiding principle to make sure everyone feels heard and understood. We have put this into practice through simple but important strategies: ensuring we give people multiple options for input with sufficient time to do so, offering variety in our scheduled times, and routinely having authentic conversations with stakeholders.

The individuals involved in DISCOVER from the beginning deserve acknowledgment for persevering during times of high uncertainty. The commitment of the steering committee members, and the working group participants has proven invaluable as we gain momentum and aim toward a potentially transformational time ahead.

Beyond the introduction of the concept, an often-shared observation is that we as a nonprofit community are good at talking about high level, grandiose concepts but have a harder time operationalizing them. DISCOVER seeks to address this by breaking down the complexity of our expansive network and providing actionable steps to realize progress for a more equitable, sustainable region. Alex Hiniker, Director of the Sustainability Initiative at Carnegie Mellon and DISCOVER steering committee member, further describes how this framework helps operationalize the complexity:

> Through my work leading the Sustainable Development Goals programs for New York City and now Carnegie Mellon University, I know the most important aspect is to focus on what the specific challenges are in Southwestern Pennsylvania and how the Sustainable Development Goals can unlock potential solutions in the region. They are not a one-size-fits-all solution and it's critical that everyone employs them in a way that will be useful in their context. It's also important to identify who should actually be engaging in these discussions. Our objective is for groups working on complementary policies to be able to determine where there is overlap or potential to do more.

We envision doing this specifically by mapping out and facilitating productive connections to align our work while creating and then amplifying data-informed regional storytelling efforts. All the while, we hold space for reflection and iteration, recognizing that networks are most successful when they are responsive to emergent needs and direction.

MOVING FORWARD

The DISCOVER network is holding a series of in person and virtual convenings and workshops in the fall of 2023. By the end of the year, the health and infrastructure working groups will have been formed and completed the regionalization of the remaining UN SDGs. The equity and environment working groups will have developed shared narratives based on the regionalized targets, indicators, and collected data.

All working groups will also spend time together developing ecosystem maps as it relates to the four areas of equity, environment, health and infrastructure. These ecosystem maps will pay special attention to activities currently undertaken across the network. This perspective will support members to align their efforts while identifying gaps, needs, and opportunities. We anticipate uncovering new possibilities for collaboration as well as fresh strategies for implementation.

The work ahead will set the stage for the next phase of DISCOVER. We will have a replicable process that can be used by dozens and dozens of facilitators across southwestern Pennsylvania to align our efforts and resources, use data to provide shared understanding, strategies, and narratives. The resulting outcomes are forecasted to support informed decisions and actions, enhance fluency and literacy to use data to instigate change, and cultivate a network with a common feeling of agency and solidarity.

Looking ahead to the longer term outcomes, the DISCOVER project will improve targets, enhance cross-sector investments, increase feelings of accountability, engagement and empowerment, and grow a culture of data use to measure and manage positive change for our communities. Our region's decision-makers will be more equipped to take stances - and action - on the issues that matter most to our communities. Our system will work more effectively in ensuring an equitable and sustainable future for Southwestern Pennsylvania.

The Importance of Youth Mentorship on the Future of Civic Engagement

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Big Brothers Big Sisters of Greater Pittsburgh

INTRODUCTION

High levels of Civic Engagement are crucial to the future of our nation. This is because high participation at all levels of our democratic system leads to a diverse group of voices being heard, which in theory should lead to a more just democracy for all. That being said, this can only be achieved if the future of our nation, our youth, feels the need to participate in the democratic process and become leaders in their communities as they age. In order for this to be achieved, today's youth have to be given the knowledge, skills, confidence, and passion needed to drive them to become a voice for their community, and the best way to achieve this is through youth mentoring. This article will look to discuss youth mentorship and break down why political and civic leaders should look to put more emphasis on the continued support of this programming around the world.

DEFINING YOUTH MENTORSHIP

Youth Mentoring in some official capacity has been around since the mid-1700s with the term "mentor" first showing up in a letter between Lord Chesterfield's CVII and his son in 1750, and the term "Mentoring" first showing up in the United States in the First book on Mentoring written by Ann Murry in 1778 (Irby & Boswell 2016). Today youth mentoring is defined as a non-professional relationship between an older person who is the mentor and a younger mentee, which benefits one or more areas of the mentee's development (DuBois & Karcher 2014). This being said youth mentoring is something that is constantly changing, due to youth mentoring programs needing to evolve to better support the communities that they serve. A great example of this is the Big Brothers Big Sisters organization, which has diversified its programming over the years to better support all youth. The Big Brothers Big Sisters organization has added specialized programs such as the Big Siblings program that specifically supports youth that consider themselves part of the LGBTQ+ community. This helps LGBTQ+ youth to be matched up with a mentor that is part of their community and who can best help them navigate the specific challenges that they might go through as they transition into adulthood. This is the main point of youth mentoring.

THE IMPACT OF YOUTH MENTORING ON CIVIC ENGAGEMENT

This youth mentoring process can make such a big difference when it comes to a child's development. Studies have shown that youth mentoring has positively impacted the socio-emotional, cognitive, and identity development of youth as well as helped to improve their chances of educational success due to mentors being able to help youth to envision future academic achievement after completing high school such as completing college or trade school (National Center for Safe Supportive Learning

Environments 2023). This helps our youth to develop into the best adults that they can be, but youth mentoring has also shown that it can have a positive impact on a mentee's future civic engagement as well, due to many mentees observing the impact their mentors have on their communities leading them to want to do the same. This leads to many mentees also giving back to the community that supported and developed them over the years.

Studies have shown that youth that are involved in youth mentoring throughout their childhood and adolescent lives are 78% more likely to participate in civic engagement and volunteer activities regularly (Elward 2023). This can include being part of political movements and volunteer opportunities that are important to themselves and their community. This is something that is not usually highlighted when discussing the outcomes of youth mentoring but is something that should be spoken about more. The United States and many other countries are continuously grappling with issues such as education, healthcare, immigration, gun violence, and climate change, on local, federal, and international levels, and the youth of the United States and others should take part in these discussions due to this younger generation being able to relate and see these issues in different ways.

HOW LEADERS CAN CONTINUE TO NURTURE AND SUPPORT THE YOUTH

It can be seen that the local, federal, and international community can all benefit greatly from continuing to support youth mentoring programs, and many governmental groups such as the Congressional Youth Mentoring Caucus and others work to do so. That being said, there are ways that individuals, businesses, and organizations can also help strengthen youth mentoring programs in their communities. There are many great youth mentoring organizations that operate throughout the United States and even Globally such as the Boys and Girls Club, The Mentoring Partnership, The International Rescue Committee, and Big Brothers Big Sisters where I am currently employed.

All of these organizations do great work when it comes to youth mentoring, but all of them need support to continue to impact more and more youth in their communities. This support can come in the form of a monetary donation, but this is not the only way that leaders and individuals can support the cause. Many organizations have a large number of youths that they want to support but do not always have enough volunteers, staff, or partners to support them. Because of this, giving your time to a youth mentoring program in your area, or looking to build up a partnership between your organization or business and one of these programs can help to continue to improve the opportunities and development of the youth that they serve. All of this support will lead to more children benefiting from youth mentoring and will create a better future for our society as a whole.

CONCLUSION

The future of our society is in the hands of our youth, but we also have to understand that our world's youth are in ours and we should be looking to prop up youth mentoring in order to help them succeed. Throughout this piece, we have discussed how important youth mentoring can be when it comes to our youth's long-term success, and how much that success will affect our society's future. This means that we as individuals and as a collective need to continue to support this work in order to give them the best chance that we can.

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Slow Walking in Circles: The Struggle to Improve African American Student Achievement in the Pittsburgh Public Schools

Anthony B. Mitchell
James B. Stewart
Wanda Henderson
Tamanika Howze
The Equity Advisory Panel

INTRODUCTION

In the late 1980s, Dr. Barbara Sizemore, a teacher, educational leader, researcher, and political activist, declared that standardized tests were "the new lynching tool for the aspirations of African Americans" in the United States and would become a national mechanism for racially segregating high achievers from low achievers in schools. Dr. Sizemore, the first African American woman to lead a major public school district, the District of Columbia Public Schools, believed these tests were racially biased and advocated for Effective Schools Research and reform. In *Walking in Circles: The Black Struggle for School Reform,* Sizemore (2008) brilliantly and prophetically forecasted the academic achievement perils that African Americans and historically oppressed groups in the U.S. would face in the 21st Century.

Today, educators use the term "achievement gap" to describe the disparities in academic outcomes between African American, Native American, and Latino students and their White and Asian American peers. Howard (2010), in *Why Race and Culture Matter in Schools: Closing the Achievement Gap in America's Classrooms,* suggests that the achievement gap was the most challenging educational and social problem facing historically oppressed groups. In addition to Howard, many other scholars have documented the disproportionate outcomes for African American, Native American, and Latino students on standardized test scores, high school graduation, placement in special education, advanced placement courses, and suspension and expulsion rates (Hammond, 2007; Jencks & Phillips, 1998; Thernstrom & Thernstrom, 2003). The investigation of these scholars asserts that the quest for liberational education is a social justice issue for historically oppressed groups.

Some scholars who write about the achievement gap advocate eliminating cultural and curriculum deficits. In other cases, scholars take a philosophical stance, arguing that the gap represents the unfinished business initiated by the Supreme Court's decision in *Brown v. Board of Education* in 1954. Both positions have merit in a pluralistic democracy and society increasingly becoming more racially and culturally diverse and divided. Payne's (2008) *So Much Reform, So Little Change: The Persistence of Failure in Urban Schools* discusses how dysfunctional relationships between civic and educational leaders and reformer groups contribute to the failure to provide millions of students with a quality, culturally relevant education. Payne's critique amplified Shujaa's (1994) assertion in *Too Much Schooling, Too Little Education: A Paradox of Black Life in White Societies.* These scholars contend that, for African Americans and historically oppressed groups, the U.S. educational system primarily promotes a Eurocentric curriculum, cultural assimilation, and loss of cultural identity. Payne's and Shujaa's analysis provides a

compelling critique of the sociopolitical and cultural realities and the challenges of educating "all" students for academic success and cultural competence in the U.S.

This analysis discusses the efforts of African Americans in Pittsburgh, Pennsylvania, to reverse decades of alarmingly low educational attainment in the Pittsburgh Public Schools (PPS). African American parents, educators, and community leaders have questioned, protested, and demanded radical educational reform and institutional transformation in the district for over half a century. In the 1980s, these objectives resulted in forming the Advocates for African American Students in the Pittsburgh Public Schools (Advocates) and legal action against the school district.

This investigation presents this critical analysis from the viewpoints and experiences of reformers. Consequently, it aims to inform and enlighten a broad spectrum of readers (e.g., parents, community and civic leaders, educational leaders, advocacy groups, researchers, and policymakers) who engage in educational advocacy and school reform. Its title, "Slow Walking in Circles: The Struggle to Improve African American Student Achievement in the Pittsburgh Public Schools," is an adaptation of Sizemore's classic study, cited previously. Indeed, much of Dr. Sizemore's leadership centered on confronting White superiority and inequities and disparities in U.S. schools and institutions, which inspired the case brought against the Pittsburgh Public Schools District. Dr. Sizemore's research and theoretical foundations have significantly influenced the Advocates' efforts over the last 30 years. Thus, it is not an overstatement to conceptualize the struggles begun by the Advocates as an opening salvo in what would become a 21st Century civil rights and educational justice struggle for public school reform in the U.S.

ADVOCATES HISTORY

The City of Pittsburgh and the Pittsburgh Public Schools populations have declined over the last few decades as the area has transitioned from an industrial to a service-oriented economy (See Table 1). Although Black people comprise about a quarter of the city's population, they constitute well over half of the enrollment in the PPS. Black students accounted for 53% of district enrollment in 2018. However, despite their majority status, African American parents and community activists argue that school leaders in the district do not adequately address the needs of students of African descent. This paper uses the terms "Black" and "African American" interchangeably. "Black" refers to people of African descent, regardless of nationality, while "African American" refers to people born in the United States with African ancestry.

The origins of the Advocates evolved from decades of African American community dissatisfaction with the district's school-community climate and increasing concerns that PPS was failing to educate Black students. In the early 1980s, the district established a School Improvement Program (SIP) to develop and pilot school improvement strategies in several low-achieving, predominantly African American schools. The African American community's concerns heightened when the SIP's "authoritarian-deficit centered" model did not contain the appropriate culturally relevant frameworks and strategies for accelerating academic achievement.

During this period, Dr. Lou Venson's, an African American educator, and Dr. Barbara Sizemore's, a University of Pittsburgh Professor, outreach to the Black community catalyzed concerns about the district's oppressive, racialized policies and inequitable educational practices. Dr. Venson directed the SIP from 1981 to 1989 and deeply understood the inadequacies of the SIP model and PPS system. Subsequently, in 1987, the Advocates, a community-based group of concerned parents, activists, and educators, mobilized to represent concerns about allegations of unfair treatment of African American students and disturbing educational achievement disparities. In the early 1990s, these concerns escalated when parents and community members questioned the district's racially biased policies and practices and commitment to providing quality education to African American students.

Table 1
Demographics of the City of Pittsburgh and the Pittsburgh Public School District

Year	Population	Black Population	Black %	Black % PPS
1980	424,000	~102,000	~24%	
1990	376,000	~96,000	~26%	
2000	335,000	~90,000	~27%	
2010	306,000	~80,000	~26%	~57%
2017	302,000	~78,000	~26%	~53%

In 1992, the Advocates' and community's concerns intensified after the district released the "Distribution of Marks Analysis Report" for the 1990-1991 school year. In this alarming report, "E" was Black students' most issued grade. District reports on suspensions and academic achievement also revealed equally distressing disparities. Highlights of these reports indicated that:

- African American student suspensions were 67.6%. Of the 36,178 total out-of-school and in-school suspensions, 24,474 were issued to African American students;
- Almost half of Middle School African American males were suspended (45.8%) compared to 23.7% for other males;
- Nearly half of High School African American males were suspended (45.5%) compared to 23.7% for other males; and
- Nearly 20% of Elementary African American males (18.8%) were suspended compared to 6.7% for other males.

Academic assessments indicated that:

- Nearly 75% of Middle School African American students failed to reach the national norm in reading and mathematics;
- African American students were disproportionately over-represented in Special Education Programs and under-represented in Gifted and Scholars Programs; and
- At only one secondary school, CAPA, a performing arts middle and high school, did African American student performance approach the national norm.

In the early 1990s, the African American community expressed outrage at the relocation of two high-performing schools (CAPA High School in Homewood-Brushton and Rogers Middle School CAPA in Garfield) in predominantly African American neighborhoods to the Cultural District in Downtown Pittsburgh. The community viewed this political, bureaucratic decision as a self-serving move by the Pittsburgh Public Schools to encourage White families to remain in the City of Pittsburgh.

The Advocates' concerns peaked during this period when a foundation-supported national superintendent search bypassed a highly qualified African American candidate for a less qualified, White candidate supported by the Board of Education. After this egregious Board decision, the Advocates filed a complaint with the Pennsylvania Human Relations Commission (PHRC) against the Pittsburgh Public Schools, alleging racially discriminatory hiring practices and policies. This courageous 1992 decision set in motion the first significant effort to initiate systematic educational reform within the Pittsburgh Public Schools.

In 1996, after four years of district motions to dismiss the lawsuit, the Pennsylvania Commonwealth Court ruled that the Advocates' complaint had legal standing on the remaining four issues:

1. Suspending and disciplining African American students at a higher rate than White students;
2. Disproportionately distributing class grades based on race;
3. Maintaining a significant academic achievement gap between African American and White students; and
4. Excluding African American students from pre-college programs such as the Gifted and the Scholars Program because of their race.

In 2005, after years of PHRC inactivity, the PHRC presented a "Conciliation Agreement" document to the Advocates, and in September 2006, the PHRC and the Advocates finalized the conditions of the Conciliation Agreement and Consent Order Terms. The Agreement's terms contained six categories: 1. Administrative Support, 2. Instructional Support, 3. Equity in Discipline, 4. Reducing the Achievement Gap, 5. Equity in Special Education Placements, and 6. Monitoring. During this period, the district's Equity Coordinator's' review of the PHRC-Advocates terms and categories expanded the Conciliation Agreement terms to 94 points of resolution to support the district's "Equity for All" mission. On September 27, 2006, the district signed the agreement, which had a five-year term, and a month later, the PHRC approved the Conciliation Agreement, which mandated the creation of a community panel to monitor the district's compliance.

EAP HISTORY

As part of the Conciliation Agreement and Consent Decree, the Advocates insisted on creating a volunteer, community-based Equity Advisory Panel (EAP). In October 2006, the EAP, a seven-member panel consisting of two district, two PHRC, and three Advocates appointees, formed to engage, monitor, and assess the district's compliance with the terms of the "Agreement." Since its establishment, the relationship between the EAP and district leaders has manifested the social and political dysfunctionality described by Payne (2008). To illustrate, from 2006 to 2011, the EAP strategically and robustly engaged the first superintendent and administration in deliberations and presented recommendations to raise the achievement of African American students. The district refused to act on these recommendations, as has been mostly the case from 2012 until the present. Consequently, despite the EAP's significant efforts to promote meaningful educational reforms, little collaborative progress with the Pittsburgh Public Schools has occurred.

Since the beginning of the PHRC-PPS Conciliation Agreement in 2006, the EAP has operated under four different superintendents: Mark Roosevelt, Dr. Linda Lane, Dr. Anthony Hamlet, and Dr. Wayne Walters. Careful analysis reveals that each administration's professional experience and ideological orientation directly influenced relationships with the PHRC and EAP, particularly efforts to address the achievement gap systemically. The first administration (2005-2010) consented to enter the "Agreement" with the PHRC and Advocates; however, this administration under Superintendent Mark Roosevelt did not adequately engage the EAP and Board of Education in policy advocacy for equity, nor did it align the appropriate internal structures to address the PHRC's terms and conditions. Notably, this administration's failure to implement Cabinet-level accountability for executing the "Agreement" delayed positive relationship-building with the EAP. This leadership problem severely hampered strategic opportunities to collaboratively address the district's high-stakes testing culture, teachers' competency and racial attitudes, and the powerful Pittsburgh Federation of Teachers (PFT) union's politics and bureaucracy.

In the second administration (2010-2016), the Superintendent, Dr. Linda Lane, was familiar with the "Agreement" and the EAP's passion for urban school reform. Dr. Lane also had significant administrative experience and responsibilities during the previous administration and advocated for addressing some of the EAP's significant concerns and recommendations, including confronting the

adverse social climate within the district that resisted school reform and culturally responsive education. In effect, her leadership skillfully challenged the Board to support equity as policy and strategically confronted the PFT's longstanding practice of protecting incompetent, majority (White) teachers' job status and careers.

In January 2010, the Board adopted an Equity in Learning Policy and a "Courageous Conversations About Race" initiative to raise personal and institutional awareness and consciousness of how bias affects achievement and opportunity. Subsequently, on January 20, 2010, the PHRC issued a "Revised Settlement Agreement Compliance Report" that stated, in part, "The Commission recognizes the Pittsburgh Public Schools' commitment to providing equal educational opportunity for all of its students and the equity initiatives it has begun to assure excellence for all." However, since the district had not achieved substantial progress in addressing the racial disparities during this five-year Conciliation Agreement, the PHRC extended an additional two-year Memorandum of Understanding from 2012-2014.

In 2012, the Board adopted the "Equity: Getting to All Plan," the first significant equity-based plan in the district's history, and established the Office of Equity to lead the district's system-wide implementation of the "Agreement, negotiate with the PHRC, and engage with the EAP.

In 2013, the district created the "We Promise Program" to address the EAP's persistent demands to improve African American males' lower graduation rates and lack of pre-college readiness. For decades, Black males' educational attainment, college enrollment, and life opportunities suffered from deficit-based policies and practices that caused disproportionate suspensions, expulsions, placement in special education, and lower graduation rates. The EAP initially lauded the "We Promise" as an initiative to remedy some of the climate and cultural factors that contributed to the "dis-education" of African American males and increased participation of Black males in the "Pittsburgh Promise," a Pittsburgh Foundation-funded scholarship program. Dr. Lane's leadership in the second administration created the Equity Office to advance equity policies and culturally relevant programming. Overall, the EAP supported her leadership's accomplishments and viewed these positive changes as evidence that the district was finally making strides toward authentic reform. However, once again, the district failed to achieve significant progress in addressing the racial disparities, so the district entered an additional Memorandum of Understanding with the PHRC for five years (2015-2020).

The third administration began in 2016 and ended with Superintendent Dr. Anthony Hamlet resigning in 2021. Unfortunately, this administration did not demonstrate visible leadership for implementing the "Agreement's" actions nor publicly advocating for the levels of institutional reform that occurred during Dr. Lane's administration. In 2017, Dr. Hamlet's initial engagement with the EAP was unproductive. Notwithstanding, at that time, the EAP remained hopeful that his leadership and administration would strengthen the Board's equity policy and proposed new equity plans and support in the final two years of the PHRC-PPS Memorandum of Agreement (2015-2020). Although each of the three administrations used different strategies to address the persisting achievement gap, none achieved any significant gap reduction. Despite their lack of success, each administration resisted, albeit in different ways, efforts by the EAP to propose alternative strategies and practices.

It is essential to point out that the racial achievement gap has not been the EAP's sole concern. The EAP and PHRC also monitor the district's compliance with the Agreement's terms in five areas:

1. Providing support to the school board, administrators, and instructors;
2. Monitoring equity in discipline (reducing suspensions and expulsions);
3. Monitoring equity in access and enrollment in advanced placement and gifted programs;
4. Developing procedures to reduce disproportionate placement in special education; and
5. Monitoring access to special programs that support students with learning difficulties and other educational challenges.

Disproportionality in suspensions is a significant concern of the EAP. Dating back to 1990-91, the alarming rates of suspensions and expulsions that school year set in motion the mobilization and activism of the Advocates. In recent decades, numerous scholars have noted the relationship between school suspensions and the "School-to-Prison Pipeline" as an association that begins with the inequitable treatment of African American males by teachers (Skiba, Michael, Nardo, & Peterson, 2002; Kunjufu, 2009). Skiba et al. (2002) found that race was the determining factor in the disproportionate percentage of African American males suspended, expelled, placed in special education, and "pushed out" of school.

Suspensions in the district continue to show that African American students are punished disproportionately to their racial counterparts. However, from 2015-2018, suspensions declined from 22.8 % to 15.9%. Also, in December 2017, the Board approved a K-2 suspension ban for non-violent offenses that the Advocates and community demanded. Today, the suspensions of African American students remain a significant concern, as increases occurred in the post-Covid-19 aftermath. There is also a concern that the district's reported suspensions do not include the unreported "in-school suspension" policies and practices that remove students from classrooms but do not report or record as suspensions. The EAP's position is that these are "cultural-deficit" policies and practices that harm the healthy social-emotional development, positive school engagement, and academic performance of African American students and their parents/families.

The racial composition of Advanced Placement (AP) courses is another significant concern of the EAP. According to gifted education researcher Donna Ford, educational leaders cannot be "color blind" to the correlation between placement in special education and placement in college preparation classes, advanced courses, or programs for gifted students (Ford, 1996). Historically, African American students' recommendations for AP courses and enrollment and exam scores have been significantly lower in the district. Data for the years 2015-2018 confirms the EAP's longstanding concern. During this period, White students were much more likely to receive recommendations for AP courses than African American students (56.1% versus 26.1%). This wide statistical gap reveals that a correlation exists between race, income (class), and behavior, as African American students are significantly disproportionate in both suspensions and access to AP courses in the district.

The failure of the PPS to institute systemic reform in these critical Agreement areas is unacceptable. In September 2012, the PHRC determined that the district's strategies failed to yield "substantial progress" for African American students and extended the Agreement an additional two years to 2014. Then, in 2015, the PHRC again found that substantial progress had not occurred. Consequently, the PHRC extended the Agreement with the Pittsburgh Board of Education for five additional years to August 2020. The current Agreement in the Memorandum of Understanding (MOU) extends from 2022 to 2027.

In Pennsylvania, the Pennsylvania Department of Education (PDE) measures student achievement using the Pennsylvania System of School Assessment (PSSA), the Pennsylvania Alternate System of Assessment (PASA), and the Keystone Exams system. The PSSA is a standardized test administered to public schools in Pennsylvania. Students in grades 3-8 take exams in English language arts skills and mathematics. Students in grades 4 and 8 take exams on skills relating to natural science. The PASA measures the progress of students with cognitive disabilities who require special accommodations, including students with Limited English Proficiency (LEP).

Since 2012-2013, high school students in Pennsylvania have taken the Keystone Exam for their standardized testing. A Proficient or Advanced level qualifies to pass the PSSA. The Keystone Exams are end-of-course assessments designed to assess proficiency in Algebra I, Algebra II, Geometry, Literature, English Composition, Biology, Chemistry, U.S. History, World History, and Civics and Government. Table 2 documents the persisting achievement/opportunity gaps as measured by standardized tests between Black and White Students from 2015 to 2018.

Table 2
Racial Achievement Gap Disparities Between Black and White Students

Assessment	2015-2016	2016-2017	2017-2018
PSSA/PASA: Math	31.0	29.9	31.1
PSSA/PASA: Literature	31.0	31.2	31.8
Keystone: Algebra I	14.0	33.3	44.7
Keystone: Literature	32.0	35.1	40.1

Indeed, it is incredibly distressing to note that, in some cases, the achievement gaps have expanded rather than declined over the past decade. The remainder of this article describes in detail the EAP's attempts to move the district to implement policies and practices with the capability of altering this trajectory and the district's lack of responsiveness to EAP proposals and recommendations.

EAP ADVOCACY AND PPS RESISTANCE

As noted previously, a primary focus of the EAP's efforts has been advocating for policies and actions to raise the academic achievement of African American students and improve their quality of life after graduation. In support of this goal, the EAP submitted recommendations to the district in March 2007. The EAP's eight recommendations presented evidence-based strategies for improving: 1. Culturally Relevant and Responsive Education, 2. Parent Engagement and Empowerment, 3. Principal Leadership and Modeling, 4. Discipline and Special Education, 5. School Violence, 6. Professional Teacher Development, 7. Evaluation of Change, and 8. Civic and Community Involvement. The EAP's recommendations reflected the findings from extensive research that identified policies and practices that promote educational equity (Edmonds, 1979; Gay, 2000; Ladson-Billings, 2000, 2006; Banks, 2007). Indeed, it is distressing to note that in some cases, the achievement declines have increased in recent years after the Covid-19 Pandemic.

Unfortunately, the district has largely ignored the EAP's consistent demands and recommendations for systemic, transformative reform or grudgingly introduced some suggestions without adequate monitoring. One of the clearest examples is the EAP's constant call for implementing a Culturally Responsive Educational (CRE) curriculum and pedagogy. Numerous researchers and scholars support CRE as an evidence-based strategy for raising the academic achievement of under-performing African American students (Ladson-Billings, 1995, 2006; Gay, 2000; Gay & Howard, 2000; Howard, 2010.). Today, it is the position of the EAP that the district's failure to implement Culturally Responsive Education system-wide has directly contributed to delaying educational progress for all students. This problem permeates the contentious climate and relationships between the EAP, the Pittsburgh Public School leadership, and administrators.

The failure of the district's school leaders to respond to the EAP's advocacy for CRE is only the "tip of the iceberg" and illustrates the district's dysfunctional organizational behavior and systematic discounting of EAP recommendations. Throughout the Conciliation Agreement, within the district, there is a history of unhelpful administrative behavior and contentious interactions with EAP members. These interactions overtly and surreptitiously manipulated disagreement and ideological divisiveness within the EAP. In the early years, these counterproductive, undermining actions visibly occurred in meetings as the district's officials openly favored their appointee's views over those of the Advocate's appointees, whose passion, expertise, and recommendations seemed less valued or acknowledged when discussing the achievement disparities. This problem significantly hampered the EAP's efforts to engage in fair, equitable decision-making and strategic planning.

On several occasions, a series of questionable leadership practices, policies, and resource allocation decisions associated with the implementation of the Agreement and limited oversight by the PHRC undermined the efforts of the EAP. This aversive implementation posture reflects an ideology that minimizes the value of input from sources not deemed to be part of the educational establishment and reduces the need to focus specifically on strategically addressing racial disparities. For example, the district established a short-lived "Achievement Gap Task Force" in 2009 that did not consult with the EAP and produced no recommendations or policy initiatives.

Unfortunately, since the beginning of the Agreement in 2006, the district's half-hearted attempts to implement the Conciliation Agreement and consistent rejection of the EAP's recommendations crystallized into complex institutional barriers. Hence, communication styles, the organization of the Equity Office, insufficient involvement on the part of the Board of Education, the teachers' union resistance, and limited PHRC oversight have compounded these problems.

RELATIONSHIP-BUILDING

Since 2007, the EAP's efforts to engage the district in the "spirit" of cooperation and collaboration experienced numerous delays and administrative turnover, including four superintendents. Notwithstanding this problem, we have developed and utilized diverse reform strategies to monitor and access information from the district. These strategies include:

1. Periodic reviews of Pennsylvania System of School Assessment (PSSA) data,
2. Monthly and quarterly meetings with district Equity Officers and administrators,
3. Annual review meetings with PHRC and district attorneys,
4. Periodic meetings with community members and educational stakeholders,
5. EAP attendance at educational conferences, and
6. Collaborating with the Equity Office to host a parent conference.

During the initial Agreement period, EAP meetings with the district's leaders and administrators were ineffective primarily due to school leaders' and administrators' efforts to control the agenda, manipulate relations and interactions, and deluge the EAP with voluminous data reports. These tactics significantly limited the opportunity for authentic relationship building between the EAP and district administrators and relevant equity policy and procedures review and discussion. Further, school leaders often ignored or tabled the EAP's requests and desire for inclusion in developing these annual meeting agendas to engage in meaningful conversations about system-wide educational practices and community issues and concerns. In 2011, the EAP attempted to address relationship issues by organizing a retreat involving school leaders, administrators, and EAP members to build a viable working relationship and identify opportunities for shared approaches to MOU implementation.

COMMUNICATIONS

In discussions about the Agreement, the assigned district personnel and EAP members' communication styles often were at odds. District personnel typically found it difficult to use language outside of the lexicon of professional educators and often seemed indifferent to "outsiders'" concerns and examples of maltreatment by individual students, parents, and community groups. Conversely, the passion EAP members regularly brought to discussions handcuffed district personnel unfamiliar with the Agreement and dialogue that focused on institutional reform and culturally responsive education. This linguistic dissonance created significant barriers to relationship-building and identifying the appropriate educational concepts, terminology, and strategies for addressing achievement disparities.

This problem also hampered the ability of the EAP to collaborate effectively with school leaders, administrators, and teachers. In January 2008, the EAP made a formal workshop presentation to principals. This workshop discussed the history of efforts to achieve educational equity, the basis for the original complaint, and the content of the Conciliation Agreement. Since 2008, no subsequent line of communication between the EAP and building principals and teachers has occurred.

ORGANIZATION OF THE EQUITY OFFICE

As noted previously, the failure to appoint a full-time Equity Officer was one of the most significant barriers in the initial years of the Conciliation Agreement (2006-2011). During this period, four part-time individuals either unfamiliar with the Agreement's terms and conditions or committed to rigorous learning about the Agreement and challenging Central Office leaders on the need to do so held this position. Consequently, during this period, most meetings were unproductive and lacked district support for the EAP's recommendations to engage in committed, meaningful, and collaborative strategic dialogue and action. In June 2014, the EAP sent a letter to Superintendent Lane complaining about the limited resources available to the Equity Office. The response promised an inventory of funds dedicated to educational equity initiatives and indicated that some responsibilities of the Equity Officer would create a more concerted focus on the Compliance Agreement.

After continued prodding in 2015, Dr. Lane established a full-time Equity Officer to lead the implementation of the Agreement. Finally, after eight years of fragmented engagement, the Equity Office supports the EAP's monitoring role and recommendations with a director who has direct access to the superintendent and cabinet of Central Office administrators. Notably, this administration developed the "Equity: Getting to All Plan," which the Board of Education supported.

LIMITED BOARD OF EDUCATION SUPPORT

In the early years, the Board of Education exhibited, at best, a lackluster commitment to the issue of educational equity. The Board adopted an "Equity in Learning" policy in 2010. This policy stated, in part, "Equity in Learning means that all policies, administrative regulations, and practices will explicitly reflect the goal of eliminating academic disparities." As noted previously, the Board's first proactive effort was the adoption of the "Equity: Getting to All Plan" in 2012. It has proven necessary for the EAP to continue engaging the Board of Directors to seek full compliance with the Conciliation Agreement. The current EAP Chair, Wanda Henderson, made a presentation to the Board of Directors on April 23, 2018. This presentation focused on the history and continuing failure of the district to comply in good faith with the terms of the Conciliation Agreement. In recent years, supportive members of the Board of Directors have occasionally attended EAP meetings.

TEACHERS AND UNION RESISTANCE

Resistance from teachers and the Pittsburgh Federation of Teachers (PFT) union to EAP efforts to introduce culturally responsive curricula and practices constituted another barrier to meaningful reform. According to Table 3, in 2018, the instructional staff in the district was overwhelmingly White, female, middle-class, and monolingual. For example, the teacher ratio of "White" to "Of Color" was 85% to 15%. "Of Color" includes employees who identify as Black, American Indian/Alaskan Native, Asian/Pacific Islander, Hispanic, and Multi-Racial. In contrast, as noted previously, most of the district's approximately 12,000 African American students are from lower socioeconomic strata. Hence, we believe that it is deceptive and misleading for the district to lump all non-White demographic groups together, in effect masking the paucity of Black/African American instructional staff.

Table 3
Demographic Characteristics of PPS Instructional Staff (2018)

Employee Group	White%	Of Color%
District Level (n=4062)	71%	29%
K-12 Teachers (n=1907)	85%	15%
Career Ladder Teachers (n=129)	84%	16%
Learning Environment Specialists (n=10)	50%	50%
Literacy Academic Coaches (n=51)	82%	18%
Math Academic Coaches (n=10)	70%	30%
Promise Readiness Corps Teachers (n=58)	93%	7%

The attitudes and weak cultural competency skills of White teachers in schools and neighborhoods that are African American, academically low-performing, and economically impoverished exacerbate the cultural mismatch between instructional staff and students. In effect, these are the schools where, historically, the achievement gaps are statistically the largest. Hence, issues of social class and teachers' racial biases, prejudices, and beliefs about the academic capabilities of African American students are factors that contribute to disparate policies and practices that negatively impact the treatment and academic performance of African American students. One of the initiatives undertaken by the EAP to address this problem was the submission of a list of books that could assist in understanding the factors undergirding inequities and practical strategies to address them.

In addition to an institutional climate that fosters massive, ineffective classroom teaching, teachers' lack of diversity training, culturally relevant teaching practices, and cultural competency skills are also significant problems that we believe directly contribute to the district's racial achievement disparities, which the EAP cannot minimize or understate at this stage of engagement. The district's most ambitious effort to address this issue was contracting with Glenn Singleton of the Pacific Educational Group in 2010 to engage in "Courageous Conversations." Singleton's "Beyond Diversity" and "Courageous Conversations About Race" help teachers, administrators, and staff understand the impact of race, specifically educators' attitudes and beliefs about teaching African American students.

The Agreement had a promising beginning in the second administration led by Dr. Linda Lane (2010-2016). It signaled Dr. Lane's commitment to the Agreement and the awareness that school leaders, administrators, teachers, and staff needed to learn and discuss how racial biases affect achievement and opportunity honestly and openly in schools. However, reviewing teachers' evaluations of their participation in the Courageous Conversations Dialogues revealed a stubborn resistance pattern among White participants to the workshop activities. Among other criticisms, the report observed:

> "Where PEG has trained numerous school district staff, there is little record of who actually has taken the training material and the extent of the use of the trainings in previous years. That there is little to no record of actual staff, dates of training, outcomes and expected products gives the impression that this is a wasted matter. Key resources like affiliates are not integrated into the school district trainings and there are concerns repeatedly voiced about the watered-down nature of the PEG trainings done by non-PEG staff."

Despite this finding, the district continued providing Courageous Conversations training. To enhance the efficacy of this effort, the EAP submitted a letter to Dr. Lane encouraging the district to solicit the participation of the leadership of the teachers' union in the workshops. Today, efforts to engage instructional staff in equity efforts are now part of the district's "Beyond Diversity School

Equity Teams and Affiliates Certification Process," which represents a follow-up and commitment to Singleton's model. Notwithstanding this important initiative, the EAP strongly encourages CRE as a more appropriate and potentially effective institutional strategy to address raising African American students' academic achievement and life success.

In Dr. Lane's administration, during the 2010-2011 school year, the district implemented RISE, a Research-Based Inclusive System of Evaluation, to provide multiple observations and a formal review of a teacher's performance at three distinct points in the school year. Utilizing RISE and findings from the National Council on Teacher Quality (2013), a think-tank education reform organization that researches, evaluates, and prepares reports on teacher prep education, equity, and diversity, the strategic plans in Dr. Lane's administration aimed to:

1. Recruit more highly qualified teachers,
2. Strengthen the substitute teacher pool,
3. Provide appropriate professional development, and
4. Increase teacher efficacies and cultural competencies in lower-performing schools.

Within the EAP, the RISE rubric presented a promising indicator that the Central Office could develop systems and strategies to evaluate and remove incompetent teachers from schools. However, as previously implied, the EAP believes that too many teachers in the district engage in high absenteeism, have poor attitudes, and possess weak teaching and cultural competency skills. Notwithstanding, the EAP remains hopeful that the district can implement more effective strategies to improve teacher quality, equity, and diversity.

INCONSISTENT AND INEFFECTIVE PHRC OVERSIGHT

Although the district initially volunteered to implement the Conciliation Agreement, the PHRC, by Pennsylvania law, can enforce such agreements. The various extensions of the Conciliation Agreement noted previously were appropriate because the persisting disparities represented continuing violations of the Agreement. Unfortunately, the oversight undertaken by the PHRC, at times, has been sporadic and inconsistent. This problem dates to 2009 when the EAP sent a letter of complaint to the PHRC, which stated, in part, "The Commission's lackadaisical oversight of this agreement appears to negate the crisis in education for African American students in the Pittsburgh Public Schools." Notably, the response from the PHRC admitted that the Conciliation Agreement did not formally require that the PPS submit annual written reports describing progress in implementing the terms of the Conciliation Agreement. Subsequently, in 2010, the EAP sent a communication to the PHRC requesting clarification of the definition of "substantial progress," noting that the term of the Conciliation Agreement would end soon without a clear understanding of how the PPS plans to assess progress.

Despite its sporadic activity, the PHRC found in 2015 that the district had not made substantial progress in eliminating educational inequities. In response, the administration indicated its intentions to strengthen its equity initiatives and continue engagement with the EAP. Unfortunately, the election of a Republican Governor in 2015 driving PDE's political agenda resulted in even less responsiveness from the PHRC. During the Republican regime, the PHRC ignored deadlines to submit mandated progress reports, and investigators rarely communicated with either the district or the complainants. District officials noticed this posture and felt empowered to delay the submission of required data and deflect efforts by the EAP to pursue focused implementation of the Agreement. Ongoing frustration with the lack of responsiveness of the PHRC resulted in the 2017 submission of a formal letter to the PHRC documenting and decrying its systematic failure to oversee the district's progress in implementing the terms of the Conciliation Agreement.

Some EAP members, facing this regulatory lacuna, explored strategies to enhance its leverage. In September and October 2010, consultations with the Duquesne University Law School legal clinic to ascertain whether the Advocates could become a not-for-profit corporation and retain its standing under the Conciliation Agreement. The corporation's creation would have allowed the Advocates to solicit funds to support its school reform efforts. Unfortunately, the research conducted by the clinic determined that the Advocates' legal standing could not transfer to such a corporation.

SUMMARY

The preceding discussion highlights how the EAP worked aggressively against formidable barriers. Nevertheless, since 2006, despite all the struggles and challenges, the EAP has consistently pursued various strategies to fulfill its responsibilities to the Advocates, the African American community and the PHRC to raise the achievement of African American students in the Pittsburgh Public Schools. Sizemore's (2008) wisdom and optimism have guided the EAP mission and will continue: "Experience and education both have convinced me that schools can change if the actors inside are committed to high achievement as a high priority and are willing to work together to achieve that end."

EAP MISSION AND ACTION AGENDA

The work of the "Conciliation Agreement" began with the establishment of the EAP in 2006. Since then, the EAP's goals and objectives have focused on catalyzing radical institutional reform. We believe that reform is necessary to liberate African Americans from ineffective leadership, incompetent teachers, curriculum oppression, and the union policies that undermine the academic success of far too many African American students. Thus, the focus of the EAP includes a host of strategies to ensure that the Pittsburgh Public Schools and the PHRC maintain accountability for implementing the Conciliation Agreement and raising the academic achievement of African American students.

The previous section documented two core elements of the EAP's strategy: i.e., aggressive advocacy for institutional commitment and equitable policies and practices and engagement with the PHRC to seek assertive oversight of district compliance with the Conciliation Agreement. In our efforts, we continue to consistently review data provided by the district and required by the terms of the Conciliation Agreement. We also continue to independently monitor learning outcomes and provide recommendations for in-service professional development programming for administration and faculty and for consultants to conduct external evaluations, such as a racial equity audit in 2023. Lastly, we rigorously advocate for adopting a CRE curriculum and outreach to the African American community by disseminating information to garner support for the systematic implementation of the Conciliation Agreement.

Data Review

The EAP's collaboration with the PHRC and the district's Equity Officer routinely monitors data and standardized testing performance by race, ethnicity, and socioeconomic status. One of the shortcomings of the original compliance agreement was the failure to require disaggregated data by gender. This oversight is problematic because, as noted previously, African American male students exhibit disproportionately poorer academic outcomes than other demographic groups on some measures. However, African American female students also experience academic and discipline inequities and disparities that require data analysis and strategic planning to address these outcomes. Fortunately, the most recent incarnation of the Conciliation Agreement mandates the disaggregation of gender data. In addition to state-mandated assessment data, the EAP frequently requests additional data reports.

Independent Monitoring of Learning Outcomes

In the 2007 workshop with administrators, the EAP introduced a "report card" exercise where district personnel graded themselves based on their performance in implementing the EAP recommendations. Among these individuals, their most common self-assessment ratings were "D" and "F." This finding, though not a surprise to the EAP, validated the EAP's concerns and analysis that the district was not committing to the appropriate leadership and resources (financial and staff) for addressing the achievement gap and Consent Agreement.

In 2010, the EAP again used the concept of a report card to condense data reporting to facilitate a more focused examination of disparities. As noted previously, the typical meetings between the EAP and district personnel involved reviewing numerous and voluminous data reports, leaving limited time for in-depth analysis and response. Unfortunately, school leaders were unwilling to provide the data in the proposed format unless this report format could substitute for the more extensive format required by the Conciliation Agreement. In addition to suggesting more useful reporting processes, the EAP has provided detailed feedback to the district and the PHRC regarding program design and monitoring progress. For example, the EAP provided detailed input regarding the district's 2013 submission to the PHRC regarding its diversity initiatives.

Professional Development and External Evaluation Recommendations

The EAP recommended several in-service professional development programs for personnel and external evaluations of the district's equity efforts, including Dr. Joy DeGruy's "Post-Traumatic Slave Syndrome," Dr. Raymond Logan's "Childhood Trauma and Parental Engagement," Dr. Linda Darling Hammond's "Effective Teaching: Equity in Gifted Instruction," and Dr. Gloria Ladson-Billings' "Culturally Responsive Teaching"; however, school leaders ignored our suggestions. Instead, the district hired expensive consultants whose educational philosophy aligned closely with the school leadership ideology. Local foundations often underwrote the extensive funds expended on these consultants. The precedent for dismissing EAP recommendations and championing consultants who supported the district's pre-existing biases started in May 2010, when the administration unilaterally co-sponsored a presentation by Dr. Ronald Ferguson focusing on the achievement gap.

In contrast to the EAP, Ferguson's approach, "An Emerging Vision for Closing the Achievement Gap," minimized the significance of cultural dissonance as a significant contributor to the achievement gap. The Courageous Conversations initiative, discussed previously, is another example. Foundations have supported several other consultants unilaterally chosen by the PPS, including the Council of Great City Schools, the National Council on Teacher Quality, and Drs. Pedro Noguera and Denise Collier. At various stages in the MOU process, these organizations and consultants have conducted climate and culture studies and facilitated professional development training. Unfortunately, few benefits resulted from these efforts, and, in some cases, the EAP did not receive the consultants' final reports, nor were the reports publicly disseminated.

The EAP has had no access to funds to implement its professional development and external evaluation proposals and lacks the authority to obtain commitments from district personnel to participate in non-district workshops. As noted previously, efforts to modify the legal status of the Advocates to facilitate the solicitation of external funding to support educational reform efforts have been unsuccessful. Although less than desirable, the EAP's resource challenges have not been insurmountable, as the panel's passion and will to achieve results for the Advocates and African American community is immeasurable. Consequently, among EAP members, the pressing question, "And how are the children today?," is the inspiring opening charge that the EAP states to the administration in meetings to demand accountability and leadership for the success of all students.

Culturally Responsive Education

The EAP's first significant recommendation advocated for system-wide implementation of Culturally Responsive Education (CRE). The basic theory of CRE asserts that culture is central to student learning and embodies a professional, political, ethical, and ideological disposition (Howard 2010). According to Ladson-Billings (1995), "It is an approach that empowers students intellectually, socially, emotionally, and politically by using cultural referents to impart knowledge, skills and attitudes." In the first three administrations, philosophical differences and debates occurred regarding the merits of CRE as a culturally relevant educational philosophy and teaching and learning curricular strategy to address the racial achievement gap. Since 2006, the EAP has recommended several nationally recognized scholars and experts on CRE and Afrocentric education to the district, including Dr. Jerome Taylor, a University of Pittsburgh scholar-researcher-expert. However, the only success to date has been the agreement with the district to engage the services of Dr. Molefi Asante to train administrators, teachers, and staff. Dr. Asante, one of the foremost scholars and experts on "Afrocentricity," consulted with a select group of administrators and teachers during the 2016-2017 school year.

Unfortunately, during the transition from Dr. Lane's to Dr. Hamlet's administration, Asante's ideological and pedagogical frameworks for instructional leadership and curriculum infusion did not receive support. Consequently, despite the EAP's adamant support and request to Dr. Hamlet that Dr. Asante's work continue and expand to other schools in the district, the incoming administration terminated Dr. Asante's contract in 2017. This questionable decision understandably disappointed the EAP and raised doubt regarding Dr. Hamlet's commitment to the Agreement and will to implement transformative, systemic school reform. Dr. Asante described his assessment of his brief, disappointing experience in the PPS in his 2017 book, *Revolutionary Pedagogy: Primer for Teachers of Black Children,* where he noted the pervasive tendency of new superintendents to remove programs instituted by their predecessors. He also suggested that the district is a low-performance system that engages in the multi-billion-dollar "high-stakes testing" industry at the expense of infusing transformative culture and pedagogy that motivates students to learn."

Community Outreach

The Advocates and the EAP have tried various approaches to inform the community about the circumstances faced by African American students and its efforts to address these problems. In July 2008, the Advocates hosted a community meeting to explore strategies in the Conciliation Agreement. Similarly, in October 2008, the EAP sponsored a community forum entitled "CRISIS: The Education of African American Students in the Pittsburgh Public Schools" at the East Liberty Branch of the Carnegie Library system. In January 2009, the EAP issued a 3-page "Newsletter Report." Unfortunately, because the EAP had to rely on district staff to produce and distribute this document, it was impossible to continue publishing this potentially valuable outreach effort.

In 2010 and 2014, Dr. James B. Stewart, the first Chair of the EAP, penned two op-ed articles assessing efforts to reduce educational disparities in the district. The first, written in 2010, entitled "Let's Stop Walking in Circles, It's Time to Close the Achievement Gap between Black and White Students," described both historical and then contemporary efforts to reduce the achievement and opportunity gaps. It also cited the PHRC's and EAP's role in challenging the district to remedy 94 problems over five years (2006-2011) and monitor compliance.

In 2014, Dr. Stewart, responding to only marginal progress in African American academic achievement, penned a second editorial, "Still Walking in Circles: Let's Rededicate Ourselves to Closing Achievement/Opportunity Gaps Between White and Black Students." This article also highlighted the support of the Gates Foundation to improve teacher assessment, the introduction of "Courageous

Conversations" workshops on race relations, and the creation of the "We Promise" program to increase support for the academic performance of African American males. Both articles referenced Dr. Barbara Sizemore's path-breaking study, *Walking in Circles: The Black Struggle for School Reform,* and identified various urban reform issues. In each edition, Dr. Stewart noted the district's lack of leadership for developing an Equity Office, limited board support, and lack of policies promoting equity.

Aside from these specific efforts, the EAP has been unable to mount and sustain an effective communication and outreach campaign. As a result, it has proven to be challenging to mobilize community support for the work of the EAP. It is helpful to contrast this experience to the success of the A+ Schools initiative, which has achieved some success in holding the district accountable by educating and organizing supporters of reform efforts. A+ Schools Pittsburgh is an independent community organization that advocates for equity and excellence in Pittsburgh Public Schools. Each year, A+ produces reports to the district and the public on all students' academic performance and achievement. The present chair of the EAP, Wanda Henderson, presented a statement on behalf of the Advocates at a student rally sponsored by A+ Schools on May 15, 2012.

Despite the limited success of its outreach efforts, the EAP has consistently challenged the district regarding its flawed parental policies and practices. In the first MOU, the EAP criticized the following:

1. Ineffectiveness of the district's communications to parents in language and style,
2. A lack of a culturally responsive parent engagement philosophy,
3. A failure to build relationships with high-risk parents and families, and
4. Ineffectiveness informing parents about policies relating to No Child Left Behind.

Today, these concerns require informing parents about the Keystone Exams and the Every Student Succeeds Act (ESSA) Parent and Family Engagement Provisions. The EAP's concerns about improving parent communications in the first, second, and third administrations are evident in the district's current efforts. Also, during Dr. Lane's administration, in August 2014, Dr. Huberta Jackson-Lowman, an Advocate founder and complainant, keynoted a parent conference at the DoubleTree Hotel titled, "Supporting the Whole Child: Embracing Our Children Holistically," which parents enthusiastically received. Thus, in Dr. Hamlet's administration, the EAP advocated for the district to contract with the Association of Black Psychologists (ABPsi), led by Dr. Jackson, to implement its culturally responsive "community-university model for parent empowerment. Although the district approved the ABPsi training in 2020, it opted for counselors, social workers, and staff to receive it instead of parents. Today, parent engagement and empowerment is a major EAP priority frequently advocated for by the EAP during MOU proceedings and district meetings.

ALUTA CONTINUA! (THE STRUGGLE CONTINUES)

In the final stages of Dr. Hamlet's tenure, after consistent pressure from the EAP to develop an MOU Implementation Plan, the administration unveiled a new draft equity plan, "On Track to Equity, Integrating Equity throughout PPS: An Implementation Plan," that will hopefully significantly alter its historical inability to reduce disparities, and expressed more openness to implementing best practices, particularly the concept of community schools.

Notwithstanding, as we now enter the fourth administration with Superintendent Dr. Wayne Walters, the central question is whether the district will continue to "Slow Walk in Circles" or partner genuinely with the EAP and develop and implement a viable strategy to ameliorate the persisting racial achievement gap and other manifestations of racial inequity. Dr. Walters, a teacher, principal, and former assistant superintendent, has 30 years in the district, including leading the district's Professional

Development and Special Programming. One promising early indicator in Dr. Walters' administration is the implementation of the Independent Racial Equity Audit, advocated for by the EAP in 2023. It is also encouraging that the teachers' union is not resisting these recent efforts to implement transformative policies and practices.

The EAP continues to advocate for radical institutional reform, including implementing culturally responsive educational strategies to address the increasing racial and cultural diversity within the City of Pittsburgh and the region. The EAP's annual reviews with the district and PHRC have documented many indicators and factors within the climate and operational systems contributing to inequities and stratifications in achievement across race, ethnicity, gender, and class.

The EAP's investigations have also identified alarming safety trends in some of Pittsburgh's predominantly Black neighborhoods and communities. For example, in recent years, the increase in youth-violence and several shootings in and around schools in the district continue to make students' safety and social and emotional health and wellness a significant concern for parents, teachers, and school leaders.

The EAP contends that these problems negatively impact the future of the Pittsburgh region, cause enrollment declines, and diminish parents' involvement and positive engagement with the district. The EAP also believes that transformational leadership, starting with the Board of Education, the Superintendent, and the Central Office administration, is imperative for modeling the vision, values, and competencies necessary to strategically address achievement disparities and create partnerships with all appropriate communities. These steps are essential for moving the district and the region toward a more positive and inclusive trajectory.

The EAP has received community recognition for its efforts. On November 9, 2017, the Office of the Honorable Jake Wheatley, Jr. organized a program to celebrate the 25th Anniversary of the Advocates for African American Students in the Pittsburgh Public Schools (Advocates). This event, held at the University of Pittsburgh, recognized the courageous leadership of the Advocates and featured speeches from Representative Wheatley, the Advocates, the EAP, and community members. This celebration also provided a timely opportunity for the EAP to update its allies, supporters, and Pittsburgh educational community on its efforts to push for systemic reform in the district.

Proponents of educational equity should know that the EAP will continue its efforts to force the district to comply with the terms of the Conciliation Agreement. Notwithstanding, if the PHRC releases the district from its obligations before significant academic achievement and systemic reform occur, EAP members will assist a new cadre of activists in seeking appropriate legislative and judicial relief to create a positive future for African American students. Hopefully, this document can provide valuable lessons for EAP successors.

Critical administrative cabinet-level positions remain unfilled because Dr. Hamlet's administration was in continual turmoil with the Pennsylvania Auditor-Generals' investigation of his spending. In addition, allegations of improper administrative conduct and high administrative turnover posed leadership and moral problems during Dr. Hamlet's administration.

In 2019, the PPS Student Performance data revealed that the proficiency rate for African American students dropped to 38.1%, while declines in reading, math, and science increased throughout the district. To confirm these concerns, observations, and accusations of the Advocates and EAP, the findings in the Gender Equity Commission report conclude that Black residents in Pittsburgh could move to almost any other U. S. city of comparable size and have a better quality of life. The report, "Pittsburgh's Inequality Across Gender and Race," provides empirical evidence of the Advocates' complaint that inequality based on race and gender follows kids throughout their school years. For example, using algebra as a middle school indicator, Black students are less likely to take algebra, but the gap is even more significant for girls. In terms of discipline, the report also confirms that "Pittsburgh refers more Black girls to the police than 99% of similar cities."

The authors of this report conclude that new policy recommendations to address disparities are a work in progress. The good news is that in 2022, the EAP and PPS Board and Administration extended the Conciliation Agreement for an additional five years to 2027 with support received from the Pittsburgh Black Elected Officials Coalition. The sobering news is that the district is experiencing enrollment declines, competition from charter schools, and facing the aftermath of the pandemic, including students' learning loss, mental health challenges, higher rates of misbehavior, and violence. Nonetheless, school reform must be non-negotiable in the EAP's longstanding efforts to raise the academic achievement and quality of life for students of African descent in the Pittsburgh Public Schools. For us, our quest is a mission that requires a constant struggle to transform an archaic system. As the African proverb teaches, "A child is what you put in him!" If not now, then when?

EAP Members: 2006 – Present

Chairs: Dr. James B. Stewart and Wanda Henderson (Advocate/EAP)
Panelists: Mark Conner*, Dr. Larry E. Davis*, Celeta Hickman*, Dr. Regina Holley, Kirk Holbrook*, Tamanika Howze (Advocate/EAP), Dr. Anthony B. Mitchell, Maria Searcy*, and Will Thompkins

* Former Member

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