



Program to Aid Citizen Enterprise

Strategic Action Planning Program

10 Year Report

February 2021

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**Program to Aid Citizen Enterprise
Strategic Action Planning Program
10 Year Report
Executive Summary**

Introduction

PACE's Strategic Action Planning Program is one of several projects developed as a result of a series of meetings in 2009 and 2010 between the executive leadership of the McCune Foundation, POISE Foundation, Richard King Mellon Foundation, The Heinz Endowments, The Pittsburgh Foundation, State Representative Jake Wheatley, members of his office and invited guests, and PACE. Following Representative Wheatley's invitation to California based [Greenlining Institute](#) to examine the diversity of grant recipients statewide, the four foundation presidents requested a meeting to discuss his inquiry. The meetings led to a research study; a series of dinner meetings; and the Strategic Action Planning Program designed and managed by PACE. The purpose of the program was to increase the number and organizational capacity of African American led, governed and serving organizations in their funding portfolios.

Sustained funding and programmatic support from Richard King Mellon Foundation, The Heinz Endowments, and The Pittsburgh Foundation enabled PACE to measurably increase the organizational capacity of four cohorts of small to midsized, African American led, serving and/or governed organizations through the Strategic Action Planning Program (SAP). McCune Foundation provided early financial support and the POISE Foundation has provided program support since the program's inception. Over 10 years, the program has served organizations with budget sizes ranging from \$29,300 to \$2,204,470.

At the beginning of the application process for Cohort IV, PACE and the funding panel expanded the eligibility to include organizations led by and serving led by people of color serving marginalized communities.

Lessons Learned and Considerations

PACE successfully completed the Planning Phase with four Cohorts of organizations seeking to build their organizational capacity. To date, 22 of 24 participants received funding support to complete and implement their 2-3 year strategic plans. Over the past 10 years of managing the program in collaboration with our funding partners, PACE has learned and observed the following:

- Years of disinvestment have kept most organizations in marginalized communities in early stages of organizational growth and development, irrespective of chronological age
- Small organizations led by and serving people of color need targeted, customer-centric capacity building programs
- SAP participants who demonstrate an independent, strong desire to engage in strategic planning in the application process have a better experience and outcomes overall
- SAP applicants who are open to rethinking their ways of operating have a better experience and outcomes overall
- The program may be more challenging for founder led, closely held organizations that may be less receptive to change
- The overarching goals crafted by the founding executive panel members 10 years ago may not be relevant to current funding panel members

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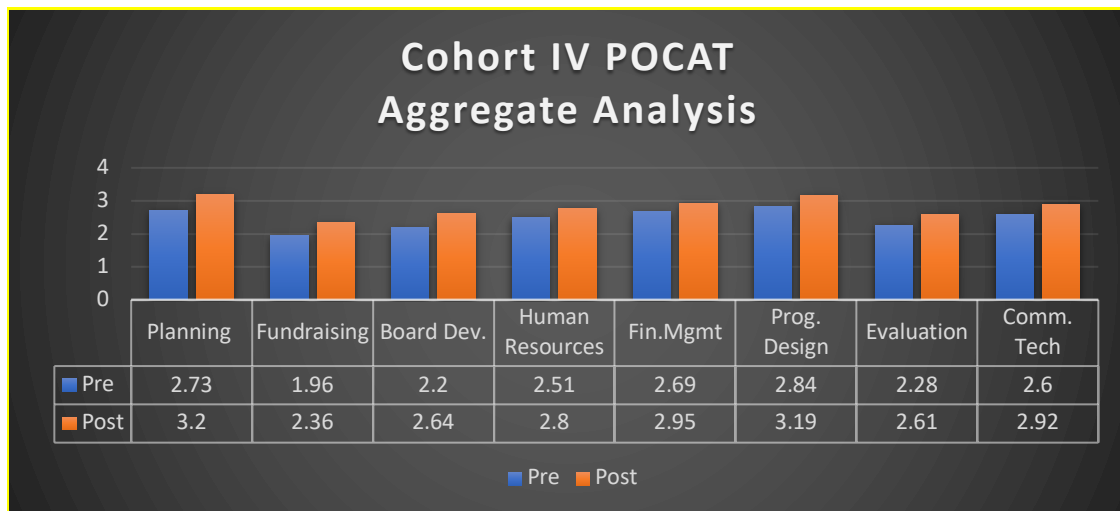
**Outcome for Cohorts I, II, III and IV.

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- PACE should continue to communicate to applicants and consultants the rigor of the program and the commitment required to be successful
- PACE should encourage our funding partners to seek to creatively support organizations through introductions, advice, support, mentoring and funding during and after completion of the program
- PACE should continue to check in with organizations to better gauge, respond, and adjust to their needs, particularly during times of stress (i.e. pandemic)

Knowledge Gains in Capacity Building

Consistent with prior cohorts of SAP, Cohort IV demonstrated measurable increases in knowledge gains in broad areas of nonprofit management and performance. Taken from pre- and post-data of the POCAT (PACE Organizational Capacity Assessment Tool), Cohort IV indicated growth in knowledge including but not limited to planning, fundraising, governance, and evaluation during the Planning Phase of the SAP Program.



Program Goals, Success Measures and Outcomes

Ninety two (23 of 24) percent of all SAP participants successfully completed Planning Phase milestones of the Strategic Action Planning Program, underscoring achievements across five broad outcome areas determined by the inaugural panel of funders for the pilot of this program in 2010. Outcomes range from the completion and successful implementation of a strategic plan to the deepening and improvement of service to constituents. Program outcomes are supported by data taken from PACE’s internal POCAT, the external CCAT and iCAT assessments and participant’s Interim and Final Reports and are highlighted in the table below:

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Goal	Success Measure	Outcome
1. Measurable increase organizational capacity	Positive change in pre/post assessments	92%*
2. Develop ongoing relationships with funding partners	Participants become direct grantees of supporting funders	44%*
3. Improve or deepen service to constituents	Positive change recorded in final reports, surveys, interviews, and direct observation	64%*
4. Increased opportunity for successful consulting engagements	Successfully completed plan	100%**
5. Successful strategic plan implementation	High priority and other funding received to implement plans	92%*

Additionally, 87% (21 of 24) of Cohort participants who completed both Phases of the Strategic Action Planning Program are operational. This compares to the Small Business Administration’s statistic that nine of 10 new business ventures fail overall, 70% by year 10.

PACE’s recent Nonprofit Effectiveness Study confirms that “nonprofits that engage in capacity building are 11 times more likely to increase their output, local scaling and contribution to community well-being, than those that do not.” The study also finds that communities of color have less access to effective nonprofits in part because organizations closest to communities with the greatest need receive less funding overall and less support for capacity-building.

Recommendations

- Based on the demonstrated success of the program, we recommend funding partners support PACE’s management of a 5th cohort
- PACE create opportunities to increase engagement between funding partners and SAP program participants
- Increase program support to founder led organizations
- Increase engagement with participants to identify and address issues

PACE appreciates the significant support from our funding partners. We are invested in helping these nonprofits strengthen their organizational capacity and their ability to increase well-being in the communities they serve. We are grateful to partner with you in this critical work for each community and for the region.

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**Outcome for Cohorts I, II, III and IV.

Program to Aid Citizen Enterprise Capacity Building: Year to Date Strategic Action Planning Program Outcomes for Cohorts I, II, III & IV

PACE, in collaboration with its funding partners McCune Foundation, The Heinz Endowments, The Pittsburgh Foundation, and the Richard King Mellon Foundation and with the programmatic support of the POISE Foundation, developed the following set of Goals, Success Measures and Outcomes for the Strategic Action Planning Program.

Since 2010, PACE has managed 4 program cohorts of 6 nonprofit organizations led and governed primarily by African American leadership that serve the African American community in Allegheny County. The purpose of the program is to build their organizational capacity enabling them to increase and improve their service to the community. Historically, selected organizations have not received significant grants or other support from our funding partners.

This report would be incomplete without acknowledging the sudden and continued fallout created by the COVID-19 pandemic on nearly every aspect of our lives. The toll it has taken on the segments of the public sector and philanthropic community is no less palpable and concerning. PACE was shaken by the onset of the pandemic and the ensuing shutdowns of business, schools, and aspects of our community. Staff began working remotely and paused various parts of our programs while we reimagined our work. Some programs, such as the SAP were in full operation utilizing a timeline that historically seeks to optimize our work with our funding panel and the goals of our program participants, particularly those related to funding. Absent knowing the funding panel's preference or plans for working with the SAP program, PACE kept the program fairly close to the established timeline.

For most Cohort IV participants, this proved to be the best approach. By the time the pandemic shutdowns were in place, four of six Cohort IV participants had completed the final draft of their strategic action plans. Of the two remaining participants, one recently experienced a loss of executive leadership and the other independently paused work in the program due to the pandemic and the later rise in local and national unrest around social injustice. This translated to a Cohort unable to present to funders on one date, as has been the norm in previous Cohorts.

Despite these setbacks, PACE is proud to have guided the Cohort to completion of the Planning Phase. As we all find ourselves still living and working with the demands and challenges of the pandemic, PACE will support Cohort IV participants as they strengthen their organizations through plan implementation during this second phase of the SAP program.

Strategic Action Planning Program Goals, Success Measures & Outcomes

Goal 1: Organizations will successfully implement high priority projects in their strategic plans and increase their organizational capacity.

Since its inception in 2010, the Strategic Action Planning Program has accepted 24 organizations into the program. Of those 24 organizations, 23 or 96% completed strategic plans focusing on high priority needs identified through the planning process. 22 or 92% received implementation funding to address their high priority action steps. Areas of focus and need for the organizations included, but are not limited to, the hiring key staff, streamlining financial management and

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reporting, board recruitment, training and development, program development and evaluation, and staff development.

Goal 1: Measure(s) of success

Success will be measured by the participants numerical change in PACE's pre/post self-assessment and narrative from their final reports

Leadership Team members (ideally 2 board members and two staff members) of participating organizations in Cohorts I, II, III & IV of the SAPP complete a POCAT, or the PACE Organizational Capacity Assessment Tool, at the beginning and at the end of the Planning Phase of the program – over a 12-13-month period. The POCAT measures the change in the organization's self-assessed knowledge and understanding across eight capacity-building markers.

As an added layer of assessment, Cohort III participants completed both the POCAT and the CCAT, or the [Core Capacity Assessment Tool](#). The CCAT, created by the TCC group, guides organizations through assessment of four capacities: adaptive, leadership, management and technical, which are reinforced through a myriad of sub capacities. The CCAT also measures organizational culture, as it influences organization's performance in the four capacities. The CCAT is administered primarily to the staff of the organization and includes 2 to 3 board members. The CCAT is best administered over a longer period, ideally every 18 months to 2 years. For Cohort IV, PACE utilized the iCAT ([Impact Capacity Assessment Tool](#)) developed by Algorithim, in place of the CCAT. The iCAT measures organizational knowledge and growth across the following capacities: Resource Generating, Leading, Learning, Managing, Overseeing and Planning, while simultaneously assessing the organization's capacity stage as either Business Development, Growth Management, Mission Advancement, or Impact Advancement. Both assessments together provide the organizations, their respective consultants and PACE staff with valuable insight to be used as a starting point for planning, as well as an ongoing management and assessment tool over time. Participants in Cohorts III & IV of the SAPP completed the CCAT and iCAT respectively at the beginning of the Planning Phase, and at the end of Year One of the Implementation Phase. Please see the attached CCAT Aggregate Analysis for Cohort III. An iCAT Aggregate report will be completed at the end of Year One for Cohort IV, slated for Fall 2021.

Cohort I Outcomes-2011-2012

- In the pilot year of the program, 100% of organizations reported an increase in at least 5 of 8 assessment markers,
- 83% or 5 of 6 organizations reported an increase in all 8 assessment markers of the POCAT.

Cohort II Outcomes-2012-2013

Of the six organizations accepted into the program, five completed the planning process and four moved on to the Implementation Phase of the program. The outcomes below represent only the four organizations that progressed to the Implementation Phase.

- 100% of organizations reported an increase in at least 3 of 8 assessment markers,

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- 75% or 3 of 4 organizations reported an increase in four or more assessment markers of the POCAT. *

Cohort III Outcomes-2015-2016

Cohort III completed the POCAT as a condition for moving ahead in the Implementation Phase of the Program. The outcomes below represent 6 of the 6 organizations that have completed the POCAT to date.

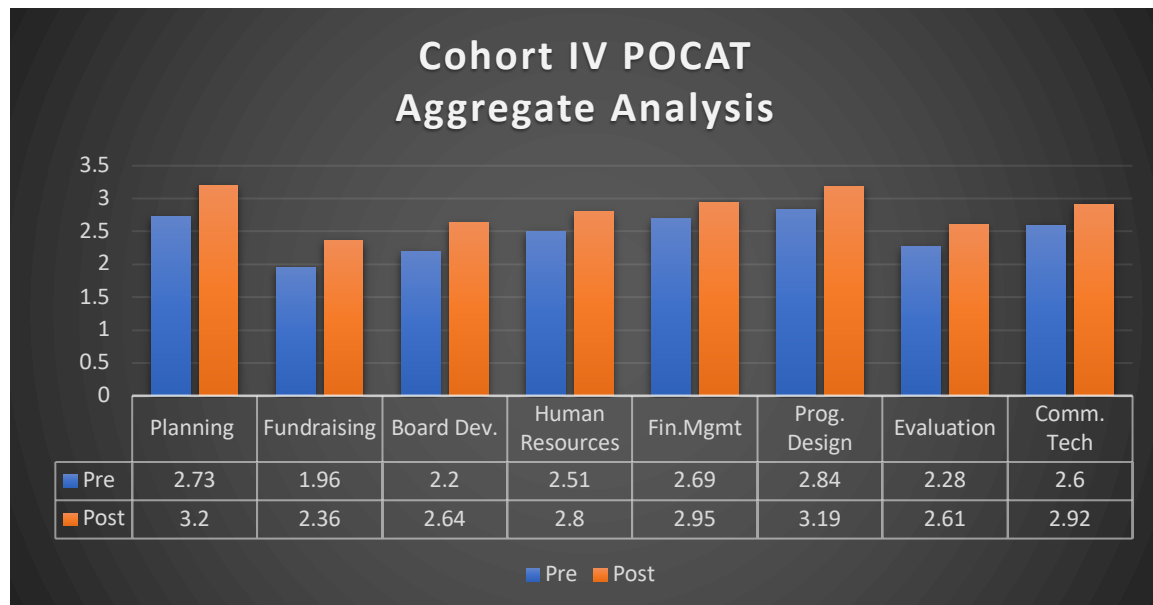
- 83% or 5 of 6 organizations reported an increase in at least 6 of 8 assessment markers,
- 66% or 4 of 6 organizations reported an increase in at least seven of eight assessment markers.

Cohort IV Outcomes-2019-2020

Cohort IV recently completed the POCAT as a condition for moving ahead in the Implementation Phase of the Program. The outcomes below represent 6 of the 6 organizations that have completed the POCAT to date.

- 100%, or 6 of 6 organizations reported an increase in 8 of 8 assessment markers

Given the diversity of this Cohort in terms of life cycle position/capacity stage, budget, and staff size, this is a notable outcome. At minimum, it suggests that even those participants entering the program better positioned than their Cohort members still experienced learning and growth in areas that directly affect their capacity to strengthen their organization in variety of ways, including but not limited to delivering services and positioning their organization to successfully seek and obtain funding support. Please see the Cohort IV POCAT Aggregate Analysis below for more detail.



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Goal 2: Organizations will successfully develop ongoing relationships with funding partners and others leading to investments in their missions and communities. As part of selection process for acceptance into the Strategic Action Planning Program prospective organizations complete an application that inquires about prior or recent receipt of grants from the funding partners and/or active requests for support. Their responses give PACE an understanding about the level of engagement the organizations have attained with funding partners prior to acceptance in the program. For Cohorts I, II, III and IV a majority, or 17 of 24 participants indicated no prior, recent, or significant awards from or relationships with the supporting funders. Additionally, most participants indicated a low level of funding diversity accompanied by low relative knowledge and understanding of how to seek new funding.

A first point of introduction to the foundation community for participants occurs during the selection process, specifically the panel interviews, when applicants are questioned about their desire to participate in the program and what they hope to accomplish. The panel consists of senior executive leadership from the supporting funders and the POISE Foundation CEO who is also a member of PACE's Board of Commissioners. Participants selected for the program receive additional feedback from the Panel upon completion and presentation of their final Strategic Plans. The outcomes are as follows:

Cohort I

- 100% (6 of 6) selected organizations were introduced to executive leadership from the supporting foundations, most for the first time
- 100% (6 of 6) selected organizations received written and verbal feedback from supporting funders on panel interviews and final strategic plans and plan presentations
- 50% (3 of 6) selected organizations indicated plans to approach supporting funders for grants at the mid and final points of the Implementation Phase
- 83% (5 of 6) selected organizations indicated plans to approach other (non-program partner) funders for grants at the mid and final points of the Implementation Phase

Cohort II

- 100% (6 of 6) selected organizations were introduced to executive leadership from the supporting foundations, most often for the first time
- 100% (6 of 6) selected organizations receive written and verbal feedback from supporting funders on panel interviews and final strategic plans and plan presentations
- 100% (4 of 4) selected organizations indicated plans to approach supporting funders for grants at the midpoint of the Implementation Phase
- 100% (4 of 4) indicated plans to approach other (non-program partner) funders for grants at the midpoint of the Implementation Phase

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Cohort III

- 100% (6 of 6) selected organizations were introduced to executive leadership from the supporting foundations. For 66% (4 of 6) selected organizations this was their first opportunity to meet face to face with members of the funding community.
- 100% (6 of 6) selected organizations received written and verbal feedback from supporting funders on panel interviews and final strategic plans and plan presentations.
- 100% (6 of 6) selected organizations indicated plans to approach supporting funders for grants at the midpoint of the Implementation Phase
- 100% (6 of 6) indicated plans to approach other (non-program partner) funders for grants at the midpoint of the Implementation Phase

Cohort IV

- 100% (6 of 6) selected organizations were introduced to executive leadership from the supporting foundations. For 33% (2 of 6) selected organizations this was their first opportunity to meet face to face with members of the funding community
- 100% (6 of 6) selected organizations received verbal feedback from supporting funders on panel interviews, final strategic plans, and plan presentations^^

Cohort IV is currently at the beginning of Year One of the Implementation Phase. Outcomes related to their plans to approach supporting and other funders will be updated upon review of their Year One Interim Reports due in Fall 2021.

It is worth noting that outcomes related to relationship building between organizations and the funding partners go beyond those measured in this report. The RFP process for all Cohorts attracts the attention of many organizations seeking participation in the program. Although only 6 were selected for each Cohort, many more submit letters of interest and ultimately receive the opportunity to meet the panel during initial interviews. For example, in 2012, Every Child Inc., (ECI) applied to the program but was not selected to participate. Following conversations initiated during the PACE selection panel for the Strategic Action Planning Program, ECI received funding support in the amount of \$250,000 from the Richard King Mellon Foundation.

The exposure to the funding partners that organizations gain, regardless of whether they are selected for program participation, has the potential to initiate and/or accelerate the organization's relationship with the funding partners. This outcome, occurring in or out of the program process, is one of the original intents of the initiative. Because of the work we do within the Strategic Action Planning Program and other programs, PACE is uniquely positioned to convene the organizations and funding partners and to initiate capacity building growth and important relationship building with the philanthropic community that can occur both in and out of our program.

Goal 2: Measure(s) of success

This will be measured by whether they become direct grantees of participating funders and others and maintain those relationships over time.

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Cohort I

- 33% (2 of 6) selected organizations made applications to supporting funders and became direct grantees within 1 year of completion of the Implementation Phase
- 33% (2 of 6—unduplicated) selected organizations made applications to other (non-program partner) funders and became direct grantees within 1 year of completion of the Implementation Phase
- 16% (1 of 6—duplicated) selected organizations made applications to other (non-program partner) funders and became direct grantees within 1 year of completion of the Implementation Phase

Cohort II*

- 50% (2 of 4) selected organizations made applications to supporting funders and became direct grantees within 1 year of completion of the Planning Phase
- 50% (2 of 4—unduplicated) selected organizations made applications to other (non-program partner) funders and became direct grantees within 1 year of completion of the Planning Phase
- 25% (1 of 4—duplicated) selected organizations made applications to other (non-program partner) funders and became direct grantees within 1 year of the Planning Phase

Cohort III

- 83% (5 of 6) selected organizations made application to supporting funders and became direct grantees within 1 year of completion of the Planning Phase
- 100% (6 of 6) selected organizations made applications to other (non-program) funders and became direct grantees within 1 year of completion of the Planning Phase

Cohort IV Cohort IV recently completed the Planning Phase of the Program. We will update the data for this outcome upon Cohort IV completion of the Year One progress report in Fall 2021.

Goal 3: Organizations will increase, improve, or deepen their service to their constituents because of increased organizational capacity building and funding.

Because of the ‘green’ nature of the organizations in both Cohorts, measures of their ability to increase, improve or deepen their service to constituents are often best held in the preliminary steps and efforts taken to position the organization for more quality and efficient service delivery. The outcomes below highlight those steps where applicable that organizations took with the intent of increasing and/or improving their services.

Goal 3: Measure(s) of success

This will be evidenced by final reports, survey, interview, and direct observation.

2020 status of Cohorts I, II and III

Successful participants in all Cohorts of the SAP program provide PACE with various types of data and feedback that PACE uses to better understand their current level of service and operations. From pre and post assessments initiated and repeated in the Planning and

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Implementation Phases, to Interim and Final Reports and evaluations at various intervals throughout the program, PACE maintains a reasonable proximity to the vitality and pulse of the participants.

At the end of the 3-year period, capped off by the close of the Implementation Phase, participants no longer provide required reports of feedback to PACE via evaluations or assessments. While this does not position PACE to collect the same level of data as is maintained during program years, it is indicative of the natural progression participants have toward relationship building with new and different funders, planning partners and collaborations

We created a 2020 snapshot of the status of Cohorts I, II and III by reviewing public financial records via GuideStar, review of participant website and news reports, and anecdotal feedback from participants who provided updated information requested from PACE. While this review is not exhaustive, it provides some information about the status of prior SAP Cohort participants and forms the basis for some of the conclusions and takeaways alluded to in other areas of this report.

Cohort I

- 100% indicated they made programmatic, board, and/or financial management related efforts to increase and/or improve their capacity to serve their constituents at the mid and/or final points of the Implementation Phase
- 50% (3 of 6) indicated an increase in the number of constituents served at the mid and/or final points of the Implementation Phases

2020 status of Cohort I participants:

One of the 6 participants in this Cohort is no longer in operation. Three additional participants experienced a change in organizational structure and temporary funding support that preceded a decline in or temporary discontinuation of services to the community. Of those 3, 1 has resurged as a more robust organization, including a changed service delivery model and geographic focus. The remaining two appear to be operating, but at lower levels with fewer staff and inconsistent funding support.

Cohort II*

- 100% (6 of 6) indicated they made programmatic, board, and/or financial management related efforts to increase and/or improve their capacity to serve their constituents at the midpoint of the Implementation Phase
- 75% (3 of 4) indicated an increase in the number of constituents served at the midpoint of the Implementation Phase.

2020 status of Cohort II participants:

All four Cohort participants remain operational and have expanded their organizational capacity to serve their communities in a variety of ways. All four added staff and/or enhanced programming to better respond to the needs and interests of those whom the serve. Executive leadership of one participant was elected County Commissioner, while executive leadership

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for another served in an arts advisory post at the request of a funder. Still another participant's work with families of color settling in the southern suburbs of the city has been experiencing sustained growth and visibility, due in part to the addition of staff and partnerships/collaborations with complimentary organizations often from other SAP cohorts.

Cohort III

- 100% (6 of 6) indicated they made programmatic, board and/or financial management related efforts to increase and/or improve their capacity to serve their constituents at the midpoint of the Implementation Phase
- 66% (4 of 6) indicated an increase in the number of constituents at the midpoint of the Implementation Phase.

2020 status of Cohort III participants:

Four of six participants from this Cohort continue to experience growth and expansion in their programs and services, enriched by additional investments from funders in and outside of the SAP program. One participant is currently undertaking massive efforts to revitalize the economic and business corridor in their community, garnering support from a variety of entities including foundation and local government. Another participant, upon completion of the SAP program made a funding application to the local United Way, a major accomplishment on its own for a small organization. The two remaining participants remain operational but at seemingly lower levels than before (during their tenure in the SAP program). Of note, these smaller two organizations largely offer youth development programs in the OST (Out of School Time space). Both participants are finding new and varied ways to maintain engagement with their communities, from providing access to resources to help families in need to offering continued, but limited drop in and/or virtual services for youth in their programs.

Cohort IV

Cohort IV has just completed the Planning Phase and recently entered into the Implementation Phase. Outcomes for this measure will be reported in the Year One Progress Report that Cohort IV participants will complete and submit in Fall 2021.

Goal 4: PACE will increase the opportunity for successful consulting engagements with groups that have limited experience with consultants by wrapping the client/consultant relationship within the support of the program

As part of Phase I, the Planning Phase for all Cohorts, selected organizations attend a training/orientation providing additional background and layout of the program. Organizations learn, among other things, how to select and successfully work with consultants over the course of the program. In Cohort I, the pilot year, consultants and organization(s) were matched by PACE based in part on the organization's planning goals and the consultant's areas of expertise. While these factors were considered for the final consultant/organization match in Cohorts II & III, PACE provided the opportunity for organizations to have a more direct role in the matching

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process by conducting a sort of “speed dating” event, where organizations were able to meet with and ask questions of prospective consultants.

After the event, organizations interviewed those consultants with whom they felt they had the best chemistry. After their interviews, the participants ranked and reported their preferences to PACE so the final matching process could occur. In all cases, organizations were reminded that matches were preliminary, contingent upon mutual agreement that the work of the program could be completed with reasonable efforts from both parties. ‘Matches’ were subject to final approval from PACE. Success was defined at minimum, by the completion of a 2 year, relevant, and “doable” Strategic Plan at the end of the Planning Phase. The outcomes for the goal are listed for all Cohorts below:

Cohort I

- 100% (6 of 6) selected organizations worked successfully with a qualified consultant to develop, produce, and present a final strategic plan at the end of the Planning Phase
- 100% (6 of 6) selected organizations reported positively about their experience working with a consultant during the Planning Phase
- 100 % (6 of 6) selected organizations reported positively about PACE’s support to both the consultant (compensation and programmatic) and their leadership team during the program

Cohort II*

- 83% (5 of 6) selected organizations worked successfully with a qualified consultant to develop, produce, and present a final strategic plan at the end of the Planning Phase
- 83% (5 of 6) selected organizations reported positively about their experience working with a consultant during the Planning Phase
- 83% (5 of 6) selected organizations reported positively about PACE’s support to both the consultant (compensation and programmatic) and their organization leadership team during the program

Cohort III

- 100% (6 of 6) selected organizations worked successfully with a qualified consultant to develop, produce, and present a final strategic plan at the end of the Planning Phase
- 100% (6 of 6) selected organizations reported positively about their experience working with a consultant during the Planning Phase
- 100% (6 of 6) selected organizations reported positively about PACE’s support to both the consultant (compensation and programmatic) and their leadership team during the program

Cohort IV

- 100% (6 of 6) selected organizations worked successfully with a qualified consultant to develop, submit, and present a final strategic plan at the end of the Planning Phase
- 100% (6 of 6) selected organizations reported positively about their experience working with a consultant during the Planning Phase

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- 83% (5 of 6) selected organizations reported positively about PACE's support to both the consultant (compensation and programmatic) and their leadership team during the Planning Phase of the program

Goal 5: PACE will support the successful implementation of participants' strategic plans by providing funds to address high priority portions of the plan and monitoring/coaching as plans are implemented.

Including grants for consulting assistance, interim grants and plan implementation grants, PACE has awarded over \$1,500,000 to 22 organizations over a 10-year period. For these organizations, this opportunity has proved to be a change agent for how they view their organization, how they plan for the organization and how they prioritize capacity-building efforts now and in the future.

For some, the funding support was sufficient to continue delivery of services to underserved populations in hard to serve communities. For others, the support translated into the recruitment, development and training of board members charged with more effectively leading and managing the organization. Still for others, the support has meant the opportunity to incrementally grow and expand their programs and services, raise the visibility of the work they do in the community and gain additional funding support from those impressed with their efforts to today. In all cases, the strategic planning process undergone by organizations in all Cohorts of the PACE Strategic Action Planning Program has been a catalyst for organizational change on various levels.

Cohort I

- 100% (6 of 6) selected organizations successfully implemented high priority areas of their strategic plans during the Implementation Phase of the program
- 100% (6 of 6) selected organizations were monitored and coached as plans were implemented over the 2-year period of the Implementation Phase

Cohort II*

- 66% (4 of 6) selected organizations successfully implemented high priority areas of their strategic plans during the Implementation Phase of the program
- 66% (4 of 6) selected organizations were monitored and coached as plans were implemented over the 2-year period of the Implementation Phase

Cohort III

- 100% (6 of 6) of selected organizations successfully implemented high priority areas of their strategic plans during the Implementation Phase of the program
- 100 % (6 of 6) selected organizations were monitored and coached as plans were implemented over the 2-year period of the Implementation Phase

Cohort IV

Cohort IV has begun the first year of the Implementation Phase. Monitoring and coaching that has occurred to date will continue for two years. Outcomes for Cohort IV will be updated once

**During Cohort II, 1 organization voluntarily discontinued the program and did not compete for implementation support, and 1 organization completed the Planning Phase, but in a process outside and independent of the Strategic Action Planning Program, decided to close their organization, resulting in 4 active participants in the Cohort during the Implementation Phase.*

^^Due to the challenges imposed by the Covid19 pandemic, the funding panel sought to speed up plan and presentation review and feedback. To that end, feedback to this Cohort was provided during virtual presentations in lieu of written feedback and comments provided in prior program cycles.

Last updated February 2021

Program to Aid Citizen Enterprise Capacity Building: Year to Date Strategic Action Planning Program Outcomes for Cohorts I, II, III & IV

their Year One Interim and Final Reports have been received, in Fall 2021 and 2022, respectively.

In summary, the Strategic Action Planning Program, now in its fourth cohort, has demonstrably built the capacity of 22 small, African American led, serving or governed organizations supporting their improved or increased services in the community.

Over the course of these four Cohorts, PACE has gained insight from the lessons learned and considerations that will inform the enhancement and delivery of the program to a potential fifth cohort. PACE is encouraged by the successes to date of current and past participants and knows that we are uniquely poised and appropriately competent to meet the organizations where they are and help them move to where they want to be. We look forward to continued partnership with our supporting funders to extend the crucial work of organizational capacity building to organizations and communities they serve.

**During Cohort II, 1 organization voluntarily discontinued the program and did not compete for implementation support, and 1 organization completed the Planning Phase, but in a process outside and independent of the Strategic Action Planning Program, decided to close their organization, resulting in 4 active participants in the Cohort during the Implementation Phase.*

^^Due to the challenges imposed by the Covid19 pandemic, the funding panel sought to speed up plan and presentation review and feedback. To that end, feedback to this Cohort was provided during virtual presentations in lieu of written feedback and comments provided in prior program cycles.

Last updated February 2021

	Afro American Music Institute	Brothers and Sisters Emerging	Joshua Development Corporation	Naomi's Place	Network of Hope	Resurrection Power Ministries
Mission	To provide systematic specialized instrumental and vocal training in all styles of the African American music tradition (i.e., Gospel, Negro Spirituals, Jazz, etc.).	To strategically advocate and connect youth of promise and families to life sustaining resources.	Provide relief to the poor and underprivileged families within Pittsburgh, Pennsylvania's Mon Valley neighborhood, and combat community deterioration and juvenile delinquency	Naomi's place works to fill a gap for homeless women in the early, vulnerable phases of recovery from addiction(s) and mental illness, when they are making the transition from institutional.	Promote lasting change for individuals, families and children by meeting personal, practical, emotional and spiritual needs.	To improve the quality of life for the children and adults of the Mon communities of Braddock, North Braddock, Rankin and Swissvale
Population served	School aged youth	School aged youth	Homeless women and children	Homeless women and children	School aged youth and families	School aged youth and families
Community Served	Greater Pittsburgh	Garfield, Bloomfield East Liberty	Mt. Oliver, Brookline, Arlington	Greater Pittsburgh, East Liberty	Coraopolis, Neville Island, Montour	Braddock, Rankin, Swissvale
Operational/Org. Age	Yes/38yrs	Yes/12yrs	No/17yrs	Yes/18yrs	Yes/18yrs	No/14yrs

Cohort I 2011-2012
Foundation Panel Members

Hank Beukema, Executive Director
McCune Foundation

Grant Oliphant, President
The Pittsburgh Foundation

Mark Lewis, President
The POISE Foundation

Bobby Vagt, President
The Heinz Endowments

Scott Izzo, Director
Richard King Mellon Foundation

	A. Philip Randolph Institute	Center for Family Excellence	Hill Dance Academy Theater	Legacy Arts Project	Lemington Community Services	Melting Pot Ministries
Mission	The Pittsburgh Chapter of APRI is dedicated to providing programs that extend democracy, education and opportunity to those traditionally disenfranchised and discouraged from participation.	To enhance the viability of families by working with parents and children to foster social, emotional, cognitive and spiritual development of the children from conception to 18 years of age.	Develop and train students 3-18yrs in Black Dance traditions, expand knowledge of Black Dance traditions, and develop emerging dance artists to sustain black dance as an art form in Black communities	Preserve the history and traditions of African art as represented throughout the diaspora through education, instruction, and interactions.	Encouraging activities and services for senior population that enhance dignity, promote well-being and independence, and encourage participation in community life.	Focuses on children and their families who are underserved by the education, social-emotional and cultural organizations in their communities.
Population served	Young adults	School aged youth and families	Youth and young adults	Youth and young adults	African American seniors/elderly	School aged youth
Community Served	Greater Pittsburgh	Greater Pittsburgh, Hill District	Pittsburgh, Hill District	Greater Pittsburgh, east end communities	East Liberty, Lemington	South Park, Bethel Park, Baldwin, Whitehall
Operational/Org. Age	Yes/10yrs	Yes/23yrs	Yes/6yrs	Yes/12yrs	No/11yrs	Yes/14yrs

Cohort II 2012-2013
Foundation Panel Members

Kevin Jenkins, Senior Program Officer
The Pittsburgh Foundation

Mark Lewis, President
The POISE Foundation

Scott Izzo, Director
Richard King Mellon Foundation

Grant Oliphant, President
The Heinz Endowments

	Coraopolis Youth Creations	Hill Community Development Corporation	Hope for Tomorrow	Homewood Children's Village	Western PA Community of Hope	Western PA Diaper Bank
Mission	Working to create positive change through collaboration, creative thinking and innovative solutions.	The Hill Community Development Corporation (Hill CDC) works in partnership with residents and stakeholders to create, promote, and implement strategies and programs that connect plans, policies, and people to drive compelling community development opportunities in the Greater Hill District.	Developing youth, in partnership with their families, to succeed in the global community by addressing academic, socio economic and relational rose factors	Our mission is to improve the lives of Homewood's children and simultaneously reweave the fabric of the community in which they live.	To provide programs for children and families in Wilkinsburg that will support their education, self-determination, and improved quality of life.	To ensure babies in need are clean, healthy, and dry.
Population served	School aged youth	Residents of the Hill District	School aged youth and families	Children and families	School aged youth and families	Families with children ages 0-3
Community Served	Greater Pittsburgh	The Hill District and surrounding communities	Sheraden and surrounding communities	Homewood, east end communities	Wilkinsburg	Greater Pittsburgh
Operational/Org. Age	Yes/15yrs	Yes/33yrs	Yes/10yrs	Yes/10yrs	Yes/11yrs	Yes/7yrs

Cohort III 2015-16
Foundation Panel Members

Kevin Jenkins, Senior Program Officer
The Pittsburgh Foundation

Mark Lewis, President
The POISE Foundation

Lisa Kuzma, Program Officer
Richard King Mellon Foundation

Rob Stephany, Senior Program Officer
The Heinz Endowments

	1Hood	A Giving Heart	Divine Intervention Ministries	Ujamaa	Youth Enrichment Services	Veterans Place
Mission	The mission of 1Hood Media is to build liberated communities through art, education and social justice.	The mission of AGH is to be recognized by the community as a leading out of school time provider that serves and inspires youth and young adults to achieve their personal best through the continued improvement of everything we do.	To provide mentoring services to current and formerly incarcerated individuals	Ujamaa Collective is a catalyst to advance Africana Women by providing a fair-trade marketplace for cultural, artistic and entrepreneurial exchange through cooperative economics in the Historic Hill District and beyond. <i>"We lift as we climb"</i>	Provides socially and economically at-risk teens with opportunities to achieve success through mentorship, education, and enrichment programming.	To empower veterans' transition from homeless to home, ending the cycle of homelessness, and to assist all at-risk veterans to become engaged, valuable citizens who contribute to their communities
Population served	Youth and young adults	School aged youth and families	Adjudicated youth and young adults	Youth and adults	School aged youth	Veterans
Community Served	Greater Pittsburgh	Mt. Oliver, Brookline, Arlington	Greater Pittsburgh, east end communities	Greater Pittsburgh, Hill District communities	Greater Pittsburgh, east end communities	Greater Pittsburgh
Operational/Org. Age	Yes/3yrs	Yes/13yrs	Yes/10yrs	Yes/6yrs	Yes/25yrs	Yes/24yrs

Cohort IV 2019-2020
Foundation Panel Members

Jeanne Pearlman, Senior Program Officer
The Pittsburgh Foundation

Michelle Figlar, Senior Program Officer
The Heinz Endowments

Liza Kuzma, Program Officer*
Richard King Mellon Foundation

Karen Abrams, Program Officer
The Heinz Endowments

Karris Jackson, Vice President
The POISE Foundation

**Selection Phase participation only*



PACE Strategic Action Planning Program

Cohort III

CCAT Aggregate Analysis and Findings

Prepared by:



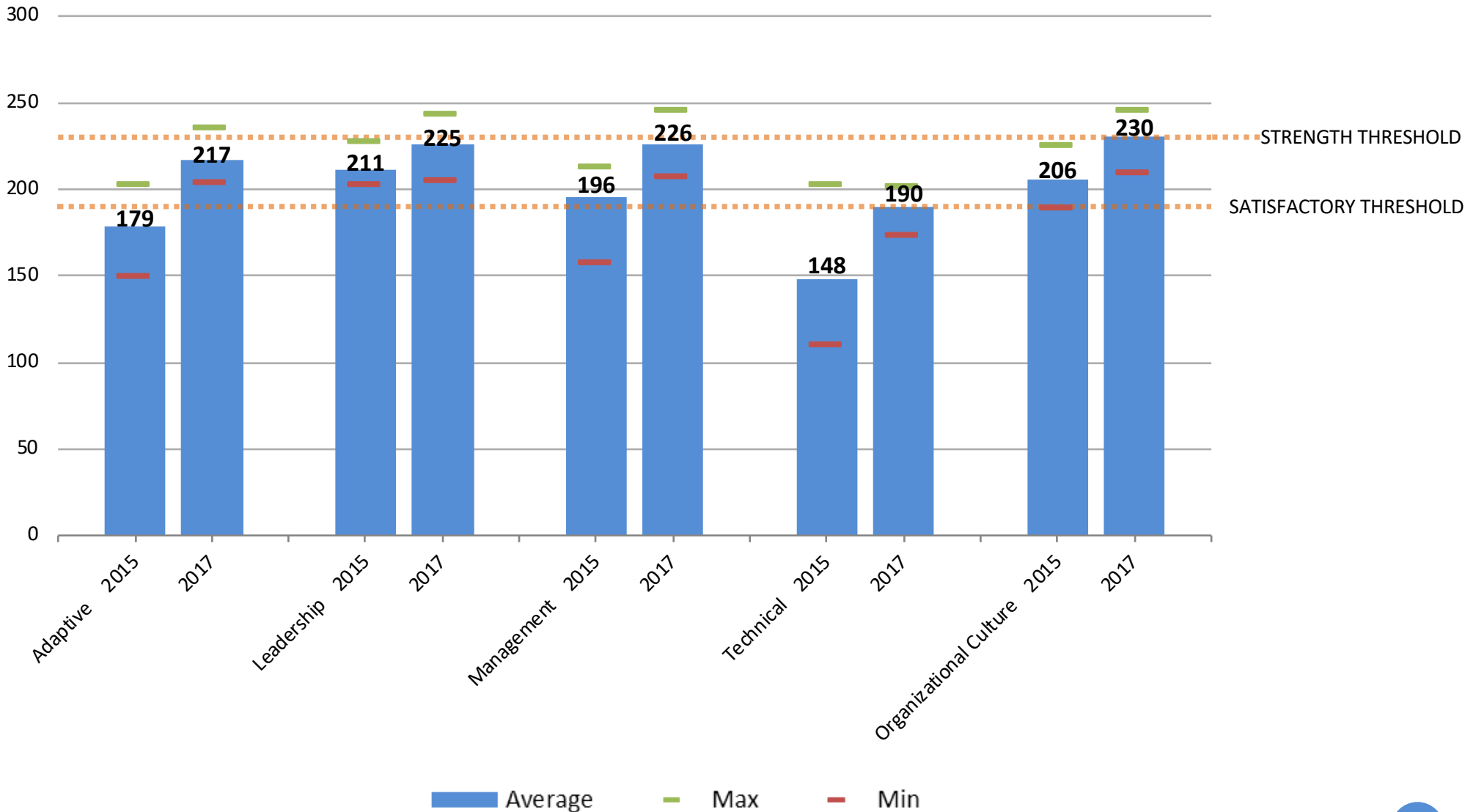
Erin Britton

*CCAT Manager
and Associate
Consultant*

APPENDIX B

Core Capacity Scores

Core Capacities: Average Scores and Score Ranges Comparison 2015 to 2017



TCC Group

New York

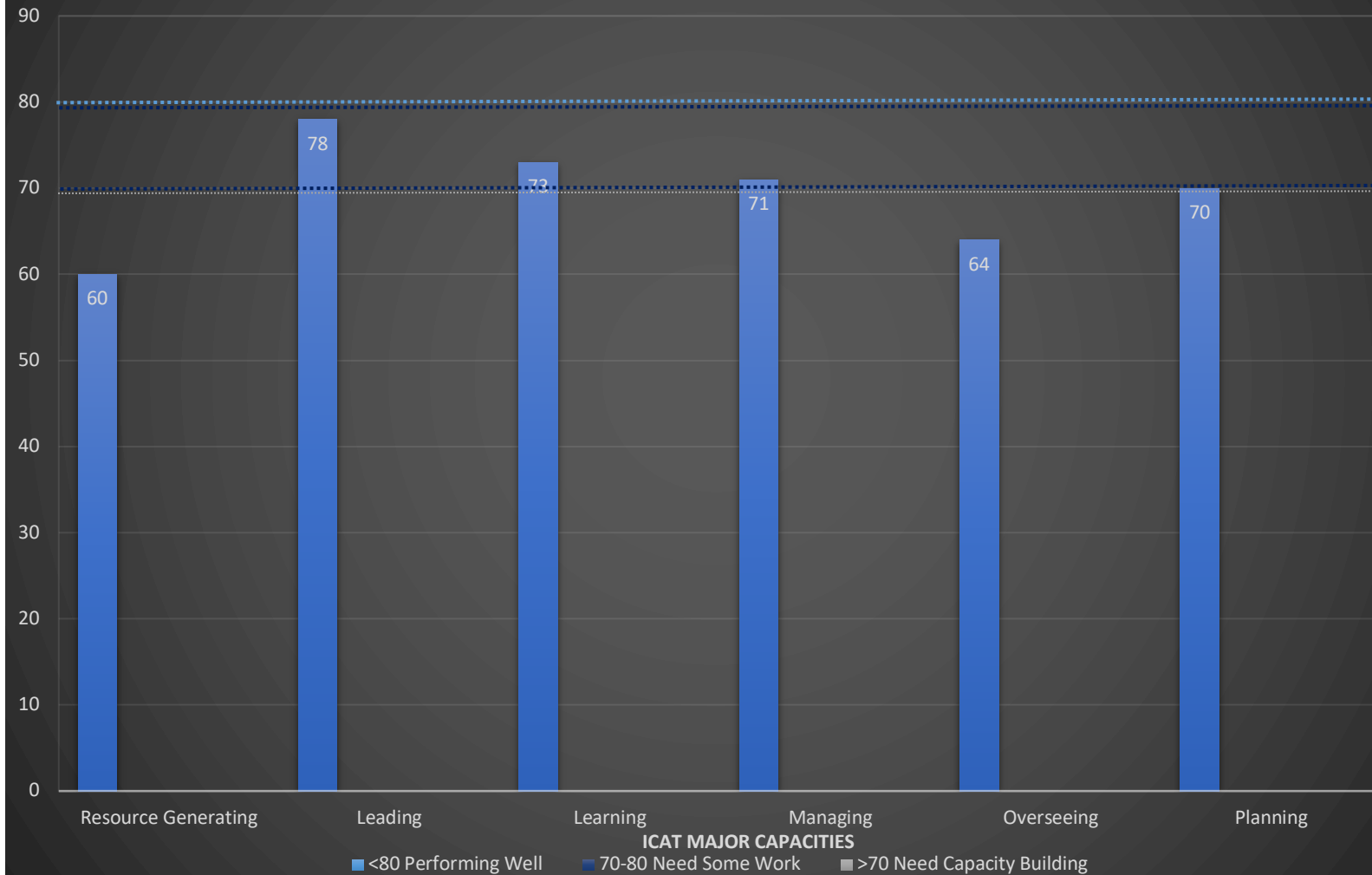
31 West 27th Street

4th Floor

New York, NY 10001

212.949.0990

Cohort IV Strategic Action Planning Program iCAT Baseline Summary-Fall 2019



These scores are out of 100 and represents the average of the organizations in this Cohort. If these organizations score, on average, below 70, they generally require capacity building in order to run successfully. An average score between 70 and 80 shows organizations that tend to need some work in order to run most effectively. An average score above 80 shows organizations are overall performing very well.

Impact Capacity Assessment Tool (iCAT) Major and Sub-capacity Definitions

CAPACITY: *Resource Generating* is the capacity of an organization to raise the funds and other resources that it needs to operate, as well as its ability to incentivize others to support the organization in doing so.

Sub-capacities:

- **Board Fundraising** is a board's ability to raise the funds an organization needs by identifying and cultivating potential donors as well as contributing financially themselves.
- **Grantmakers** is an organization's ability to raise funds from corporate, foundation, and governmental sources.
- **Individual Donors** is an organization's ability to identify, cultivate, and ask individuals for donations.
- **Marketing** is an organization's ability to effectively market its mission and programs to the community, funders, and donors.
- **Partnership** is an organization's ability to establish effective partnerships and collaborations with others to maximize the use of resources.
- **Staff Fundraising** is a nonprofit staff's knowledge, motivation, and skills to effectively fundraise.

CAPACITY: *Leading* is an organization's capacity to articulate a clear vision for itself and incentivize everyone to achieve that vision.

Sub-capacities:

- **Community Leadership** is an organization's ability to inspire external partners, collaborators, and stakeholders to work toward a common vision and mission.
- **Mission Leadership** is an organization's ability to inspire people within the organization to work toward a common vision and mission.

CAPACITY: *Learning* is a nonprofit's capacity to collect, process, and use information about its programs, operations, and external environment for the purpose of furthering its mission.

Sub-capacities:

- **Advocacy Success** is an organization's ability to assess its policy/advocacy efforts
- **Environmental Context** is a nonprofit's ability to assess its external environment.
- **Organizational Capacity** is an organization's ability to assess its operational capacity and infrastructure in relation to making progress on its mission.
- **Population Needs** is an organization's ability to assess the needs of a target population in relation to its programs, services, or strategies.
- **Program Success** is an organization's ability to assess the impact of its programs and direct services.
- **Staff Performance Assessment** is an organization's ability to assess the performance of its staff.

CAPACITY: *Managing* measures an organization's ability to utilize its human and financial resources in an efficient and effective manner.

Sub-capacities:

- **Community Collaboration** is an organization's ability to identify and collaborate with partners in the community to further its mission.
- **Facilities** are an organization's ability to manage its space and facilities effectively.
- **Program Implementation** is an organization's ability to effectively manage the quality of program implementation (direct service and/or advocacy efforts).
- **Staff Deployment** is a nonprofit's ability to effectively manage paid staff.
- **Staff Professional Development** is an organization's ability to effectively provide professional development and to support staff in the process of putting what they learn into practice.
- **Staff Recruitment and Retention** is an organization's ability to effectively recruit and retain staff.
- **Technology** measures an organization's ability to effectively use technology.
- **Volunteer Engagement** measures an organization's ability to effectively manage volunteers.

CAPACITY: *Overseeing* measures an organization's ability to hold itself accountable financially and for the achievement of its impact.

Sub-capacities:

- **Financial Overseeing** measures a board's ability to oversee an organization's finances.
- **Impact Accountability** measures a board's ability to hold an organization accountable for the achievement of outcomes.
- **Implementation Accountability** is a board's and staff leaders' ability to effectively implement a strategic plan.

CAPACITY: *Planning* measures an organization's ability to effectively make decisions and plan for the future.

Sub-capacities:

- **Decision-making** is the ability of an organization's leaders to effectively make decisions.
- **Strategic Planning** is the ability of an organization's leaders to plan strategically.