CASE STUDY

The Pittsburgh Foundation

What's Possible When Program & Donors Services Teams Work Together Toward Shared Goals

It can be common for program and donor services teams at community foundations to feel siloed from one another, with each team serving a different part of the community in pursuit of distinct goals. But for the Pittsburgh Foundation, intentional integration of the teams on key areas of work has led to more engaged donors and more dollars moved to make positive change happen in its community.

The Pittsburgh Foundation, established in 1945, is one of the nation's oldest community foundations. Today, it has grown to nearly 70 full-time staff and $1.4 billion in assets, with an average of $20 million in foundation-directed grants made each year. In 2020, before the foundation's board began a strategic planning process, staff chose racial justice as one of five values governing their work. Also in that period, president and CEO Lisa Schroeder appointed Michelle McMurray as vice president of program and community engagement, and Lindsay Aroesty as vice president of development and donor services.

The program team has strong relationships across the community and on-the-ground experience with many of the issues facing Pittsburgh. The nonprofits it chooses to fund are doing work the team believes is making the greatest difference in creating equitable outcomes in the community. The foundation recognized that the program team's knowledge could be leveraged when engaging with donors. Research shows donors tend to give to organizations they have a personal connection to, rather than ones that might have the greatest impact in their community. Program team members could bring their knowledge, experience, and relationships built over decades to help donors direct funds to organizations making a meaningful impact.

In this context, Michelle and Lindsay saw an opportunity to evolve their partnership with one another and between their teams to influence donors to support the foundation's grantees. Around this time they participated in a cohort with Community Wealth Partners, which provided them with structure, space, resources, and relationships with peer organizations to help build this new partnership.

Shifting Team Mindsets

Over time, Michelle and Lindsay realized both teams had mindsets that were limiting the foundation's impact.

The donor services team brought a customer service approach, by which team members viewed themselves in service to donors rather than to the foundation's mission. "We would say to donors, 'Tell me about your philanthropy and how we can help,'" Lindsay said.

At the same time, program team members didn't believe donors were aligned with the foundation's values. "Typically, the only donors they would hear about were ones who voiced opposition to the foundation's values or funding priorities," Michelle said. "We don't talk about the mission-aligned donors enough. We had to make a cognitive shift about who our donors are and what they care about. It's not that they don't care about the things we care about. These donors often haven't been presented with the opportunity to support us in our discretionary giving."

Lindsay and Michelle knew a better approach was possible. If the program and donor services teams could work together better, they could collectively educate and invite donors to give in ways that could amplify the impact of the foundation's discretionary grants.

Integrating Practices

To begin changing their assumptions, the teams started meeting together regularly. They deliberately gave themselves space to experiment with new approaches to their work.

The teams' first attempt to integrate their practices began in 2022. The program team began putting together personalized funding proposals for donors that listed specific organizations that aligned with the donor's interests. The donor services team would then bring those proposals to those donors for discussion. This approach proved labor intensive. It also offered some grantees more visibility to donors, creating unintended inequities.

Then in 2023, the foundation created five "field of interest" funds that aligned with the five grantmaking focus areas: basic needs, equity and social justice, environmental action, arts and culture, and economic mobility. These focus areas roll up to the foundation's broader strategic priorities Each fund is composed of several grantees who work in that focus area. With the field of interest funds created, the teams could bring slates of grantees to donors and invite them to partner with the foundation in a particular area. They've successfully received more than 25 grants from donors into these field of interest funds.

The teams also adopted another practice: Near the end of each grant cycle, they invite donors to either match the foundation's funding or help fill the gaps between foundation funding and the amount grantees requested. The donor services team will reach out to donors and say, “We believe in this organization, we’ve vetted them, but we haven’t been able to fully fund their requests. Would you join us in funding their work?” Through this tactic, they were able to raise $320,000 in one grant cycle.

“We’re working to leverage the trust that our donors have in the donor services team, in order to create better connections and get to more robust giving,” Lindsay said. “We are trying to make more of a connection between what we’re funding through our discretionary grants and how aligning with those priorities is a value-add for donors. This speaks to the need for our donor services team to be able to communicate about the foundation’s grantmaking priorities effectively.”

Talking with Donors

Asking donors to invest in the foundation’s grantees has required teams – especially the donor services team – to practice new ways of interacting with donors.

In 2023, the foundation worked with the consulting agency Plus Delta Partners to develop new skills and practices around donor conversations. With the consultants’ support, the teams developed a process to prepare for donor meetings:

1. The donor services team will review the donor’s prior grantmaking to understand their interests and bring to the donor any ideas or projects that might resonate with them.
2. They’ll send an agenda to the donor before the meeting with 4-5 topic areas that align with the foundation’s mission, in order to prepare the donor to talk about their own interests as well as how it fits with the foundation’s understanding of what will drive change in the community.
3. If needed, the donor services team might invite a program officer to join certain meetings if their expertise would help in educating the donor. The teams are careful to make sure it’s a productive use of the program team member’s time and that each participant is clear on their role in the meeting.

While this approach is more time intensive for foundation staff on the front end, it allows meetings with donors to be more productive by quickly homing in on how they can make an impact. Donors have shared that the meetings are a much better use of their time, and ultimately the same is true for the foundation too.

One challenge the donor services team has faced is talking about issues and nonprofits of which they don’t have deep knowledge. The team initially wanted to develop more expertise on the issues grantees address before talking with a donor about it. “Background information gives us confidence, but it’s never enough,” Lindsay said. “We can talk to donors about the affordable housing situation in this county, even if we don’t know all about it. We’re trying to develop confidence in my team to have conversations and know that you won’t be perfect, but your team has your back.”

This mindset has helped the donor services team understand that an encyclopedic knowledge of the myriad issues facing the community is not required. Instead, when faced with questions they can't answer, the donor services team has gotten better at saying, "I don't know. I'll get back to you," or "I think we should have a follow-up meeting where I can bring some resources to you."

They've also started to occasionally bring program officers with relevant expertise to donor meetings. "We want donor services team members to know, 'You're not alone in this. I want to get this donation as much as you do,'" Michelle said of the program team's approach. "When we think about resources just in our department, we're limited. When we think about resources as institutional, we can tap into our common goals."

The donor services team has learned to lead with curiosity and experiment with different language when speaking with donors. For example, one donor wanted to give a large donation but was hesitant because of the foundation's racial justice language. "I gave him a 90-second commercial about why we have a racial justice lens, and it fell flat," Lindsay said. "So I said, 'Tell me what you want to accomplish.'" What the donor wanted – greater food access and housing options – aligned with the foundation's racial justice work, just from a different angle. So Lindsay's team provided the donor with a slate of grantees doing that work.

"In development, our goal is getting the gift to the greatest need," Lindsay said. "I've been able to do that by choosing careful language, being empathetic to what the donor wants to do, and trying to meet in the middle."

Prioritizing Relationship- and Trust-Building

To integrate the work of their teams, Michelle and Lindsay first had to build trust with each other.

Early on, they began meeting regularly with one another to understand each other's work and build a shared vision. "I need to be versed in her work in the same way she's versed in mine, so we can be collective ambassadors about the work we're trying to do," Michelle said. "Change happens through relationships, at the speed of trust. If we don't trust each other, we're not changing anything." They continue to invest time and energy in maintaining a strong relationship and talking through challenges together.

It has also required both the program and donor services team to prioritize building trust with donors. "When we don't make assumptions about who donors are and what they care about, we can cultivate relationships of trust with donors that translates into them funding things they haven't before," Michelle said. For example, most of the foundation's donors care about the post-pandemic downturn of Pittsburgh businesses and cultural districts. In response to this, the foundation is leading a webinar series on the post-pandemic recovery that has seen record numbers of donors signing up and asking about how their funds can help.

Advice

The Pittsburgh Foundation offered advice to other community foundations working to break silos between their program and donor services teams and drive donor dollars toward organizations having the greatest impact in their community.

- **Balance patience and action.** "Be patient. Understand this does take time. Investing time upfront – going slower – means you can make change faster," Lindsay said. "But at the same time, there are things we can do now with less painfully slow intellectualizing."
- **Don't make assumptions. Instead, pause and explore.** When the foundation announced its strategic plan and its emphasis on racial justice, some were worried lots of donors would walk away. Although a handful of donors – less than 25 – did leave, those fears were largely unfounded. "We have to challenge our assumption about who is part of our fold," Michelle said. "We heard stories about donors who were upset. We didn't hear enough stories about the folks who were really excited, or those who had questions but once those questions were answered, were like 'I get it.'"
- **Invest in building staff competency.** The foundation invested time and resources in racial equity training for staff, as well as support for each team to work through how it applies to their area of work specifically. "Leaders have to invest in resources for their staff to increase competency to have difficult conversations," Michelle said. Building their racial equity competency helped the duo have difficult conversations to understand how their personal racial identity – Michelle as a Black woman and Lindsay as a white woman – impacts their experience with each other, in teams, when talking with donors, and while doing this work. This understanding has been critical to support one another and work from a foundation of trust.
- **Don't try to be perfect; be authentic.** "This is hard. There's no road map for what we're trying to do," Lindsay said. "Be patient with others and yourself. Show up authentically in your effort to do better."

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Get In Touch

EMAIL: hello@communitywealth.com
WEB: www.communitywealth.com

Who We Are

Community Wealth Partners is a social impact consulting firm guided by a vision of a world where all people have what they need to fully live into their potential, particularly those who are kept furthest from resources and power.

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