



# Investment Advisory Councils: A Community-Driven Grantmaking Pilot

## Summary of Pilot and Lessons Learned

### Grantmaking Pilot Background

In 2020, The Heinz Endowments began an evaluation partnership with [Child Trends](#). Their goal was to strengthen the prenatal-to-three (PN-3) system in Allegheny County, Pennsylvania through improved collaboration and to help it become more equitable by focusing efforts on children and families who encounter barriers in the current system. The work began with the creation of a [PN-3 framework](#) and a scan of The Heinz Endowments' PN-3 grantmaking. Child Trends also shared guidelines for equitable grantmaking, such as requiring grantees to draw upon diverse community perspectives, making applications and reporting less labor-intensive, and being flexible with how funding is spent amid shifting community needs.

To apply some of the equitable grantmaking strategies, The Heinz Endowments and their PN-3 Fellow piloted a community-driven grantmaking process through Investment Advisory Councils (IACs). The IACs included nearly 40 members from local government, nonprofits, the private sector, and community members (see membership list at the end of this document). The members were in three groups: maternal and infant health, economic security, and child care—key domains of the PN-3 Framework. As the IACs progressed, the Heinz PN-3 Fellow engaged the Allegheny County funder community to form the Early Childhood Funders Alliance, and transitioned the pilot to Grantmakers of Western Pennsylvania. The IACs were evaluated by Child Trends and Propulsion Squared.

## Structure and goals

In Spring and Summer 2022, the IACs met for a total of eight hours across four sessions. Each group had a lead organization that would have the opportunity to draft a funding proposal at the end of the process. The sessions were facilitated by individuals outside the county with expertise in each area and insight into the work of other states and counties. Each session included a data packet and optional reading material to give all participants access to contextual information that could shape discussions. The IACs aimed to achieve the following three goals:

**Goal 1:** Convene a diverse group of cross-sector partners to establish a shared vision for an equitable PN-3 system in Allegheny County—with intentional focus on engaging Black women and members of historically under-resourced communities/stakeholder groups as leaders in this process.<sup>1</sup>

**Goal 2:** Increase integration and alignment of cross-sector investments for young children and families throughout Allegheny County.

**Goal 3:** Design a well-coordinated funding approach designed to reduce disparities and increase accessibility to services and economic supports for all families.

In addition to the coordinated funding approaches, the IACs would also develop recommendations to inform future grant-making strategies within Allegheny County.

## Overarching themes

The following table provides an overview of the high-level themes discussed within each group.

Maternal and Infant Health	Economic Security	Care Child
<ul style="list-style-type: none"><li>• Long-standing social determinants of health impact maternal and infant health issues today.</li><li>• Employers are major players who can positively impact families, yet they are rarely engaged.</li><li>• Wages are key for addressing and preventing maternal and infant health inequities.</li><li>• Public health systems could do a better job meeting families' unique needs.</li></ul>	<ul style="list-style-type: none"><li>• Need to address the factors that precipitate family crises.</li><li>• The meaning of “economic security” differs based on individual/family context.</li><li>• Social capital is essential for economic security and can be intentionally developed.</li><li>• Strategies and policies must be flexible and meet the needs of individuals and families as they evolve.</li></ul>	<ul style="list-style-type: none"><li>• The workforce shortage and wages for early care and education professionals are the most pressing issues that need to be addressed.</li><li>• Employers need to be part of conversations/solutions because child care affects people's ability to work.</li><li>• Need to professionalize the field in ways that work for child care programs and incoming staff.</li></ul>

<sup>1</sup> The systemic inequities and racism Black women face are leading to particularly egregious disparities in Allegheny County. Black Women's Policy Agenda (2022, May 31). Situating the Voice and Experiences of Black Women in Greater Pittsburgh. [https://www.blackwomenspolicycenter.org/files/ugd/8006ab\\_a9cf52be3ce7410390d790e3f1aaba8b.pdf](https://www.blackwomenspolicycenter.org/files/ugd/8006ab_a9cf52be3ce7410390d790e3f1aaba8b.pdf)

## Findings from participants

Participating organizations were surveyed four times throughout the IAC process to assess whether IACs were meeting intended goals.

- **81% of respondents** agreed that their IAC increased connections between organizations.
- **81% agreed** that their IAC process increased shared understanding of key PN-3 issues.
- **80% agreed** that their IAC engaged Black women and members of historically under-resourced communities/stakeholder groups as leaders in this process.
- **Each IAC** saw participation of public and private sector partners. Although the proposed projects did not explicitly combine public and private resources, each IAC project strategically integrated the work into existing efforts.
- **Around half of participants** felt their groups were informing decision making around PN-3 resources and that their IACs increased cross-sector alignment. Some participants felt there was a lack of sufficient time to reach these larger goals.

*“The big benefit of this to me was really bringing us into a broader conversation...we definitely have been working together but not intentionally and strategically in this way.”*

## Funded projects and recommendations

At the end of the IAC process, each group developed a proposal that will receive \$250,000 over a two-year implementation period. Proposals addressed goals in one or more of the PN-3 Framework domains. Rather than lengthy write-ups, the groups received a brief proposal template to fill in with relevant information. IACs also developed recommendations that funders could look to for future opportunities. The proposals and recommendations for each IAC were:

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**Maternal and Infant Health:** Hire a Project Director for the [Allegheny County BIRTH Plan](#), establish a fellowship to support cross-sector collaboration, and build a community-oriented data dashboard.

Additional Maternal and Infant Health recommendations:

- Promote cross-system collaboration to improve maternal health service delivery.
- Increase community accessibility to maternal health data and systems of accountability for health care providers.

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**Economic Security:** Pilot a guaranteed basic income (GBI) program that includes 25 low-income Black mothers with young children to reduce racial and gender wealth disparities.

Additional Economic Security recommendations:

- Complete comprehensive asset mapping to identify the existing resources and gaps to improve coordination across the system of supports for families.
  - Establish a plan for a comprehensive evaluation of service delivery and access.
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**Child Care:** Address workforce shortages and support teacher retention through a region-wide public relations campaign.

Additional Child Care recommendations:

- Ensure that child care programs can meet the needs of families in Allegheny County.
  - Rebuild a strong pipeline of high-quality early childhood educators across all settings.
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## Evaluator Recommendations

Through observations, survey data, and interview data, the evaluators of the IACs identified opportunities to strengthen the IAC process in future iterations.

1. **Consider a larger role for families in the process.** From the survey, 72 percent of IAC participants indicated that direct participation by people who use PN-3 services would have strengthened the IAC process. Future IACs should consider ways for families to meaningfully engage and inform proposals.
2. **Consider structures that foster more collaboration.** Each IAC had a lead organization that was pre-determined by the funder to receive the grant. Future IACs can consider allowing the groups more power to decide what and who is funded.
3. **Develop descriptions of roles and responsibilities.** Future IACs should consider creating role descriptions so everyone has a clear understanding of what is expected of them.
4. **Foster group ownership of the process.** Each IAC was quite different. In some, members were more familiar with each other and had previously collaborated; in another IAC, the group was meeting for the first time. Time spent on foundation-building activities (e.g., getting to know one another, building trust within the group, reviewing data) was not equally needed among the three groups. Future IACs could determine the goals and structure of each session.
5. **Plan how the IACs will support and complement existing community assets and structures.** IACs are part of a larger system with many collaborative groups. It is important to identify where the IACs fit into that system and how they add value. In some cases, it may be better to join an existing group instead of convening a new group. In short, IACs should ideally supplement existing work.



# IAC members

The work of the IACs would not have been possible without the following participants who shared their time, knowledge and expertise, and passion for improving PN-3 equity in Allegheny County.

## Maternal and Infant Health

- **Tina Sherman**, MomsRising – Facilitator
- **Jada Shirriel**, Healthy Start – Lead organization
- **Cara Nikolajski**, University of Pittsburgh Medical Center
- **Dannai Wilson**, Allegheny County Health Department
- **Debbie Gallagher**, Council of Three Rivers American Indian Center (COTRAIC) Early Head Start
- **Debra L. Bogen**, Allegheny County Health Department
- **Elissa Edmunds-Hunt**, Allegheny Health Network
- **Erin Stanley**, Child’s Way
- **Jessica Brooks**, Pittsburgh Business Group on Health
- **Karin Shafer**, Alliance for Infants and Toddlers
- **Kelsey Brentley**, Nurse\*
- **Sarah Elizabeth Morrow**, University of Pittsburgh Medical Center

## Economic Security

- **Christina Keitt-Chaney**, MoCaFi – Facilitator
- **Tammy Thompson**, Catapult – Lead organization
- **Alice Washington**, Stepping Stones
- **Amy Malen**, ACDHS
- **Betty Hill**, Macedonia FACE
- **Chandani Sharma**, Women and Girls Foundation
- **Chanel Allen**, Pittsburgh Brown Mamas
- **Christina Bell**, Pittsburgh Business Group on Health
- **Diamante Walker**, Family Scholar House
- **Heather Arnet**, Women and Girls Foundation
- **Kim Eckel**, Footbridge for Families
- **Lance Chimka**, Allegheny County Economic Development
- **Muffy Mendoza**, Pittsburgh Brown Mamas
- **Rochelle Jackson**, Black Women’s Policy Agenda
- **Susie Puskar**, Partner4Work

## Child Care and Early Education

- **Thelma Wong** – Facilitator
- **Cara Ciminillo**, Trying Together Pittsburgh – Lead organization
- **Brittini Burley Wright**, Early Excellence Project – Lead organization
- **Lyasha Bishop**, Early Excellence Project – Lead organization
- **Becky Mercatoris**, Department of Children’s Initiatives
- **Carol Barone-Martin**, Pittsburgh Public Schools
- **Denise Hill**, Urban League
- **Heather Hopson**, Single Moms Defined
- **Kyrie Bushaw**, Parent\*
- **Megan Nestor**, Allegheny County Department of Children’s Initiatives
- **Megan Rose**, National Council of Jewish Women Pittsburgh
- **Monique Jackson**, Child Care Provider\*
- **Patricia Stanko**, Family Provider\*

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\* Indicates member was a family or community member participant

## Investment Advisory Council Implementation and Evaluation Team members

Propulsion Squared and Child Trends, with consultant support from Ideas to Impact Consulting, worked with the PN-3 Fellow to inform the design of the IACs and evaluate their process.

- **Robyn Tedder**, Heinz PN-3 Fellow and Project Lead
- **Christopher Sleeme**, Leading to Movement, Capacity-building partner
- **Laura Johns**, Leading to Movement, Capacity-building partner
- **Chad Dorn**, Propulsion Squared, Evaluation Team Lead
- **Kathryn Tout**, Child Trends, Evaluation Team Lead
- **Andra Wilkinson**, Child Trends, Evaluation Team Lead
- **Kristine Andrews**, Ideas to Impact Consulting, Evaluation Team member
- **Rowan Hilty**, Child Trends, Evaluation Team member
- **Kara Ulmen**, Child Trends, Evaluation Team member
- **Priya Koushik**, Child Trends, Evaluation Team member

**For more information**, please contact the Early Childhood Funders Alliance ([rtedder@candorandcoconsulting.com](mailto:rtedder@candorandcoconsulting.com))

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