



## HEARTH Board of Directors Meeting Agenda

January 17th, 2024

Time: 5-7pm

Location: HEARTH  
3724 Mt Royal Blvd  
Glenshaw, PA 15116

Topic	Time
I. Call to Order	5:00pm
II. Approval of agenda & minutes	5:05pm
III. HEARTH Executive Committee Report	5:10pm
A. Vote: Strategic Plan 2024-2026	
B. Vote: Interim CEO Position	
IV. Benet Woods Board President Report	5:25pm
V. Reports	
A. CEO Report	5:35pm
B. Treasurer, Finance Committee	5:50pm
C. Programs Committee	6:10pm
D. Governance Committee	6:20pm
E. Development Committee	6:40pm
VI. New Business & Announcements	6:55pm
VII. Meeting Adjournment	7:00pm

**Next Board Meeting Date: March 20th, 2024 at HEARTH**



**HEARTH**  
**Board Meeting Minutes**  
**November 15, 2023; 5:00 PM**  
**In-person, Enterprise Bank**

**Attendance**

**Present: Kimberly Buchheit, Michelle Fontana, Jennifer Hoerster, Nikki Hudak-Fink, Jennifer Lawrence, Brian Matthews, Milena Nigam, Christine Pietryga, Kyona Newsome; Megan Lang; Brandon Baldauf (Benet Woods); Violet Thompson (Benet Woods); Anthony Herman, Kate Swanson, Brittany Meteck, Jordan Schaker, Stephanie Bachman, Alyssa Kruse, Janet Duderstadt, Jamie Kuhn, Bryan Thompson, Reagan Mickey, Colleen Elliott, Kate McKenzie**

**Excused: Michelle Walker; Angela Scotto, Brocton Skeen, Adrian Turner, Randy King, Marcia Oglan, Maxwell Hine; Delia Barnett, Lea Brown,**

1. Call to order and introductions, 5:05 Jamie
2. Approval of agenda and minutes 5:07
  - a. Not enough people from HEARTH board to approve
  - b. 5:41 motion to approve minutes, passed
3. Benet Woods Board President report (Violet)
  - a. See Benet Woods handout
  - b. Still one unit vacant but applicant is expected to be approved soon; board feels that the process is taking too long with NDC (property manager) but hopefully things will speed up now
    - i. Administrative expenses is at 25% is for NDC management cost: property fee + salary fee; board is not happy that we are paying a salary when units are left empty
    - ii. Are there any local property managers who would work pro bono? Maybe Trek (not pro bono, but could be good manager)
    - iii. Are we paying too much?
4. HEARTH Board President report (Michelle) 5:14
  - a. See handout
  - b. Topics to discuss at Executive Committee listed on handout
5. Young Professionals Board Report (Steph) 5:18
  - a. See handout
  - b. Eleventh Hour Event
    - i. No tickets sold, open to public
    - ii. Key goal to spread awareness of HEARTH, reach a new audience
    - iii. 50/50 + raffles

- iv. Great networking
- v. Kim put together baskets, thank you!
- c. Bar Eleven
  - i. Usually at Halloween but bc of Hats Off they changed to December event
  - ii. Suggestion to put up flyers in neighboring South Side businesses
- d. Hoping to recruit more members to Board
- e. How is Young Professionals defined?
  - i. Anyone up to 40 yrs
  - ii. We don't currently have a pathway from YPB to HEARTH Board
- f. Q: at events, is there opportunity to collect attendees' contact information? Could collect business cards for a raffle (or something more contemporary/tech!)

## 6. Reports

- a. CEO Report (Christy) 5:28
  - i. See handout
  - ii. Appreciate YPB and Benet Woods participation
  - iii. Emailed offer to Family Support candidate to a HEARTH graduate, who will start on Monday
  - iv. Regan received a volunteer award for her child work at HEARTH
  - v. Ongoing opportunity for professional development; at Bayer and also Temple U.
  - vi. "HEARTH provides mothers with children surviving domestic violence and homelessness."
  - vii. Clothing closet: Michelle's friend Adele might be able to help with clothing donation + winner of window design contest will donate money to HEARTH
  - viii. New partnership with grant writer
    - 1. We're ahead of schedule with our grant applications
    - 2. Hillman
    - 3. PFAR, asking for \$350K, decisions in May, effective July 1
- b. Treasurer, Finance Committee (Brian) 5:38
  - i. See handout
  - ii. Q1 isn't usually a great quarter; Q2 and December and Year End Appeal are always better
  - iii. Move \$250K cash funds into Fidelity
    - 1. Motion passed
  - iv. Loss of \$65 in Q1 is YTD, but we are on budget
  - v. Reimbursement for CAMP will hit Q2, which will improve the Q1 loss
- c. Programs Committee (Kyona) 5:43
  - i. See handout
  - ii. Committee scheduled to meet next week to choose our final 2 candidates for HEARTH to Home
    - 1. Criteria to apply: in a HEARTH-owned program or housing
    - 2. Finalists are chosen based on a scoring matrix
      - a. Looking for candidates who already have experience paying around \$850/mo in housing expenses
      - b. Finance for stability is a key factor
      - c. Need is also considered
      - d. Question: do we need to worry about discrimination/bias in the criteria?

- 3. Program committee will make a first and second recommendation to Enterprise; we want two candidates in case first candidate is not able to find a house in their preferred location
    - iii. In January Board will get to see what data will look like in Insync
  - d. Governance Committee (Kim) 5:48
    - i. See handout
    - ii. Committee will make recommendation for Member Expectation and Board will vote via email
    - iii. Pause on new members until Feb. in order to assess our Board policy; then will build a Board orientation packet
    - iv. What are our current Board skills/strengths/assets/gaps?
    - v. Near-term: Board education around HEARTH
  - e. Development Committee (Colleen) 5:54
    - i. Looking at funding opportunities, Board donor connections
    - ii. End of Year appeal: Board do a joint appeal/goal of \$25K (as part of \$95K EOY goal)
      - 1. Give Lively fundraising page? (uses PayPal)
      - 2. Could we ask the founding board to match what our board raises?
      - 3. How do we set things up for company match?
      - 4. Foundations will match employee donation
    - iii. Hats Off total net is \$50K
      - 1. Greater \$\$ raised than last year despite lower attendance but we netted a little less bc expenses were greater than last year
      - 2. We'll be looking for a new event coordinator
    - iv. Christy has been working with Kate to help foster founder donation, estate planning
    - v. Is Tees and Traps + Hats Off the right mix? Do we want a Purse-like event?
      - Other fundraising event ideas?
        - 1. Can we do a joint board event?
        - 2. How does our Board help the YPB capitalize on their events?
        - 3. There's a good group that loved Purses—how do we keep in touch with them? Include them into our continued fundraising?
          - a. Christy hears about Purses constantly
          - b. Is the cost worth the benefit?
7. New Business and announcements
  - a. Janet: ask Enterprise to have lawyers look at our criteria for HEARTH to Home
8. Meeting adjournment (Michelle) 6:07



**Vote: HEARTH's Strategic Plan (January 2024-December 2026)**

- Goal 1: Meet and exceed Allegheny County's transitional housing performance measures (Source: Allegheny County's Performance Management Quality Report, based on national HUD standards)
- Goal 2: Develop an individualized domestic violence safety plan for each DV survivor at HEARTH
- Goal 3: Reach 100% board engagement by creating a Quality Enhancement Plan, Board standards, and recruitment strategy.
- Goal 4: Prepare the build/rehab of an additional 20-30 units of permanent affordable housing in the North Hills of Pittsburgh

**Vote: Interim CEO Position**

- Deb Dejardins, Advancement Advisors
- March 5th - June 21st
- 8-10 hrs/week at \$150/hr
- CEO's maternity leave planned for March 15, 2024- June 13, 2024 (90 days)

**Upcoming Board Meetings:**

- March 20, 2024
- May 15, 2024
- July 17, 2024 (Social)



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# **3 YEAR STRATEGIC PLAN**

## January 2024-December 2026

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# HEARTH's Mission & Vision

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## Purpose, Direction, and Principles

### Mission

Our mission is to provide a range of supportive services and housing that empowers homeless families, who are survivors of domestic violence or other trauma to become independent, self-sufficient, and adequately housed; to foster housing opportunities to prevent homelessness and encourage safe, affordable housing.

### Vision

Our vision is for every family and individual to live in safe, affordable housing.

### History

The organization was founded in 1989 after a group of service providers in northern Allegheny County identified affordable housing as the foremost-unmet need in the area. Identifying its first project, the development of transitional housing for women and children in crisis in Allegheny County, the group raised almost \$1 million to renovate two floors of the former St. Benedict's Academy in Ross Township into 15 self-contained apartments! This transitional housing program opened its doors in June of 1995 to homeless women with children who desired to become economically self-sufficient. In 1997 North Hills Affordable Housing became HEARTH (Homelessness Ends with Advocacy, Resources, Training and Housing).

### Focus

HEARTH exists to serve and empower women with dependent children who are in need of transitional housing as a result of homelessness due to domestic violence or other trauma and who are committed to working toward self-sufficiency. Our focus is to move families from homelessness to economic self-sufficiency then into permanent housing. This is accomplished by assisting mothers in securing employment or obtaining marketable skills through training programs in the community.



## Context for Implementation & Progress

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### **HEARTH Board of Directors & HEARTH Staff**

The HEARTH Board of Directors and HEARTH staff will work collaboratively to meet and exceed the goals listed in this strategic plan in order to enhance the services provided to families at HEARTH.

### **HEARTH Board of Directors**

The Board of Directors will assess the progress for each goal, measure completeness, and actively work toward goals at the committee level.

### **HEARTH Staff**

The HEARTH staff will work in conjunction with the Board of Directors and provide progress updates for goals at the committee level.

### **Monitoring the Strategic Planning**

Ongoing monitoring and revision are two important aspects of effective strategic planning. Process will include:

- Incorporating the vision priorities, goals, and actions of the strategic plan into program and individual work plans and budgets.
- Reviewing overall performance of HEARTH's results against the plan at each board meeting and making the appropriate revisions to the plan.
- The strategic plan progress grid will be completed and reviewed at each board meeting

## Conclusions from Board's Goal Grid Activity

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These conclusions summarize the views of HEARTH's Board members who participated in the Goal Grid Activity conducted during HEARTH's offsite.

### Achieve

- The Board would like to obtain a higher level of awareness of the organization and its services throughout the community. The board also sees this as an integral part of growing the donor and volunteer base which will ultimately help to achieve financial stability.
- The Board noted to achieve its goals, the board must stabilize its members who are dedicated and committed to the cause and who hold positions within the community that can have impact on the future of HEARTH

### Preserve

- Financial integrity by achieving quarterly targets throughout the strategic plan
- The culture of service that focuses on the families and ensures the dignity of mother's is preserved
- The leadership of HEARTH which is held in high regard
- Ability to house 20+ families by driving a greater level of partnerships with complementary organizations

### Avoid

- Inactive committees
- Over allocating the same board members (doing most of the work)
- Non-fit volunteers

### Eliminate

- Poor internal relationships by implementing a system of communication
- Fixed mindsets and status quo e.g., old ways
- Board backfills for transitioning members – must have necessary skill sets

# STRATEGIC PLAN GOALS 2024-2026 : GOAL 1

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**Goal 1: Meet and exceed Allegheny County's transitional housing performance measures (Source: Allegheny County's Performance Management Quality Report, based on national HUD standards)**

**Action:** Implement the below measures into data dashboards and assess performance monthly. Program committee will identify and resolve barriers in meeting performance measures in conjunction with HEARTH Staff.

**Lead:** Christy Pietryga, CEO (Programs Committee & Kyona Newsome, Program Director)

**Resources:** Allegheny County Department of Human Services Performance Report based on national HUD standards

**Measurements:** Finalize performance measures, build data dashboards, review at committee level, present at board meetings, enhance services, as needed

## **Performance Measures Include:**

- Gain or Increase Income (Adults only)  $\geq 50\%$
- Gain or Increase Employment/Education (Adults only)  $\geq 30\%$
- Maintain or Increase Non-Cash Benefits (Adults only)  $\geq 70\%$
- Have Health Insurance (Adults and Child)  $\geq 90\%$
- Exits to Permanent Housing Destinations  $\geq 85\%$
- Utilization  $\geq 85\%$
- Length of Time in Program (Average Days)  $\leq 270$  days
- Length of Time in Program (Median Days)  $\leq 270$  days

## STRATEGIC PLAN GOALS 2024-2026 : GOAL 2

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### **Goal 2: Develop an individualized domestic violence safety plan for each DV survivor at HEARTH**

**Action:** Create and implement a higher level of care for all domestic violence survivors to ensure the proper level of ongoing safety, wellness, and security are provided.

**Lead:** Kyona Newsome, Program Director (Programs Committee & Christy Pietryga, CEO)

**Resources:** Center for Victims, Women's Center & Shelter of Greater Pittsburgh, City of Pittsburgh Domestic Violence Unit, The Allegheny County District Attorney's Office Domestic Violence Prosecution Unit

**Measurements:** Develop plan, pilot phase, implement program-wide, assessment phase (qualitative and quantitative). Goal: 100% domestic violence survivors have a safety plan.

### **Domestic Violence Safety Plan Includes:**

- Forms/Questionnaires:
  - Identify domestic violence
  - Safety Plan, as necessary
  - Follow Up questions to identify needs, services, and healing
  - Guide to assist in taking legal action, as necessary
- Direct Care
  - Develop joint program with Center for Victims or other DV specialized nonprofit to ensure proper level of clinical care and support
  - Collaborate with partner agency to provide support to family
- Assessment
  - Conduct qualitative and quantitative assessments to measure effectiveness, strengths and improvements

## STRATEGIC PLAN GOALS 2024-2026 : GOAL 3

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**Goal 3: Reach 100% board engagement by creating a Quality Enhancement Plan, Board standards, and recruitment strategy.**

**Action:** In order to increase board engagement, develop a Quality Enhancement Plan that communicates board expectations and lays the framework for recruitment of new members. Plan includes standards regarding meeting attendance, committee involvement, annual fundraising efforts, and partnerships that enhance HEARTH's services.

**Lead:** Governance Chair (Governance Committee & Christy Pietryga, CEO)

**Resources:** Bayer Center for Nonprofit Management at Robert Morris University, The Forbes Funds

**Measurements:** Complete SWOT analysis with Strengths, Weaknesses, Opportunities, and Threats of HEARTH board. Develop board standards regarding attendance, involvement, financial, and partnerships. Assess skill sets needed on the board for a recruitment plan of new board members.

## STRATEGIC PLAN GOALS 2024-2026 : GOAL 4

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### **Goal 4: Prepare the build/rehab of an additional 20-30 units of permanent affordable housing in the North Hills of Pittsburgh**

**Action:** Utilize HEARTH's resources and partnerships to develop a plan to add an additional 20-30 units of permanent affordable housing to meet the 1:3 ratio as advised by Trek Development (3 permanent housing units to every 1 transitional housing unit). This will provide opportunities for families in HEARTH's transitional housing program to access permanent housing upon program completion.

**Lead:** Development Chair & Finance Chair (Development Committee, Finance Committee, Benet Woods' Board & Christy Pietryga, CEO)

**Resources:** PHFA (Pennsylvania Housing Finance Agency), Trek Development

**Measurements:** Finance committee: budget projections for project, evaluate current assets and provide budget for project. Development committee: Evaluate funding streams to meet these needs including PHFA's funding cycles. Incorporate Benet Woods' Board to identify properties and opportunities for redevelopment.



## Benet Woods Report - January 17, 2024

### **PHFA Inspection at Benet Woods**

- On December 22, 2023 PHFA inspected Benet Woods - tentatively passed. Minor repairs requested within 90 days of PHfA report being filed (1/10/24). NDC/HEARTH staff conducting a re-inspection on January 31st to document improvements and repairs

### **Occupancy at Benet Woods**

- 1 vacant unit - in process of evaluating candidates

### **Property Management**

- Exploring property management options in 2024 for quality assessment and cost comparison

### **Benet Playground**

- Benet Woods board planning to replace and enhance playground area in Spring/Summer 2024



## CEO Report - January 17, 2024

### HEARTH Team

- Family Support Specialist Hired November 2023
- Delia Barnett, Finance Director, provided resignation due to employment opportunity. Last day at HEARTH is January 26th (Interim selected)
- Kyona White received Pittsburgh North Regional Chamber Community Champion honor
- Megan Lang celebrating her 13th work anniversary with HEARTH this month

### PR/Shift Report

- Attached for review, look at social media platforms and website traffic

### Professional Development Opportunities for HEARTH Team

- HEARTH's Family Support Specialist enrolled in Temple University's Strength Based Family Workers Certification Program
- Kyona White enrolled in Temple University's Leaders of Strength Based Family Workers Certification Program

### Founders Breakfast

- February 2024: Founders breakfast at HEARTH to include steering committee and board members from 1989-1995. Tentative date : February 23rd

### Boardable

- HEARTH Board adopting the Boardable app/web based platform to access minutes, board directory, board decks, bylaws, etc
- Login sent to each board member January 17th
- Demo provided at board meeting

### Volunteers at HEARTH

- 152 volunteers: 81 internal volunteers (on site, directly supporting our mission) and 71 external volunteers (fundraising/event support)
- 650 hours of volunteer support -- over \$20,000 economic impact
- Volunteer Appreciation Event - Thank you for helping us grow! September 2023 - celebrated the volunteers and their impact on our mission - Millie's Ice Cream, Jersey Mikes, plant your own pot, and spending time with our families
- Future direction - planning for more onsite and group opportunities, launching Bloomerang Volunteer, keeping up with assessments/audits of volunteer activities, annual Volunteer Appreciation event

### Grants Report

- 2023-2024: Grants received, pending, planning



## Website Highlights

### Visits and Visitors (GA4 terms: Users, New Users, and Sessions):

In future reports, Shift will be able to report on the following:

- Users (the total number of people who visited your site)
- Sessions (a visit on your site, which begins when someone lands on your website)
- Engaged Sessions (sessions that last longer than 10 seconds, have a conversion event, or has at least 2 pageviews or screenviews)

Because no data is available to us from October, this particular report doesn't include comparison data between November and the previous month.

### Session Acquisitions/Referrals:

The top three channels bringing traffic to the website were Organic Search, Direct, and Referral traffic.

The external sites referring the most traffic to HEARTH were Google, Bing, and Facebook.

**Important:** We can also see that more than half of your users access your website via mobile; therefore it will be important to ensure your website is optimized for mobile users (both because it will offer a better user experience, and because Google considers mobile performance of websites generating search results).

### Audience + Behavior:

Slide 3 of this report offers insights into who is visiting your website.

Note that the majority of Sessions by Age and Gender are categorized as "Unknown." This is because Google only tracks demographic information for visitors to the site that are logged into a Google property.

The data available to us, however, can still be a useful sampling of who is using the HEARTH website.

### Content Performance:

Slide 4 of the report highlights the content that is most viewed by site users.

In November, almost 60% of users land on the HEARTH homepage when visiting the website (as the homepage is almost always the most visited page on a website).

The other most popular landing pages are: Do You Need A Safe Place, What We Do, About Us, and Donate.

## Social Media Highlights

### Facebook

**13 posts** went out on Facebook in November.

The total number of post engagements on this platform decreased almost 51%. Because Hats Off took place in October, it makes sense that we would see a "downward" trend in engagement after the more timely event reached its conclusion.

Top posts this month included:

- the winners of the Western PA Rising Stars award
- the North Hills Art Center thank you post
- Rep. Lindsay Powell's visit to HEARTH

### Instagram

**14 posts** went out on Instagram in November.

Impressions were down slightly MoM, while engagement and reach increased MoM.

Instagram's top posts were:

- the winners of the Western PA Rising Stars award
- an invite to an Ugly Sweater party
- the North Hills Art Center thank you post

### LinkedIn

**15 posts** went out on LinkedIn in November. Impressions of the content increased almost 70% MoM, and key engagement measurements also increased (i.e. reactions, clicks, comments, and shares). The top posts were:

- the winners of the Western PA Rising Stars award
- Rep. Lindsay Powell's visit to HEARTH
- a photo of children's family artwork

Total users  
**1,276**  
↑ N/A

New users  
**1,276**  
No data

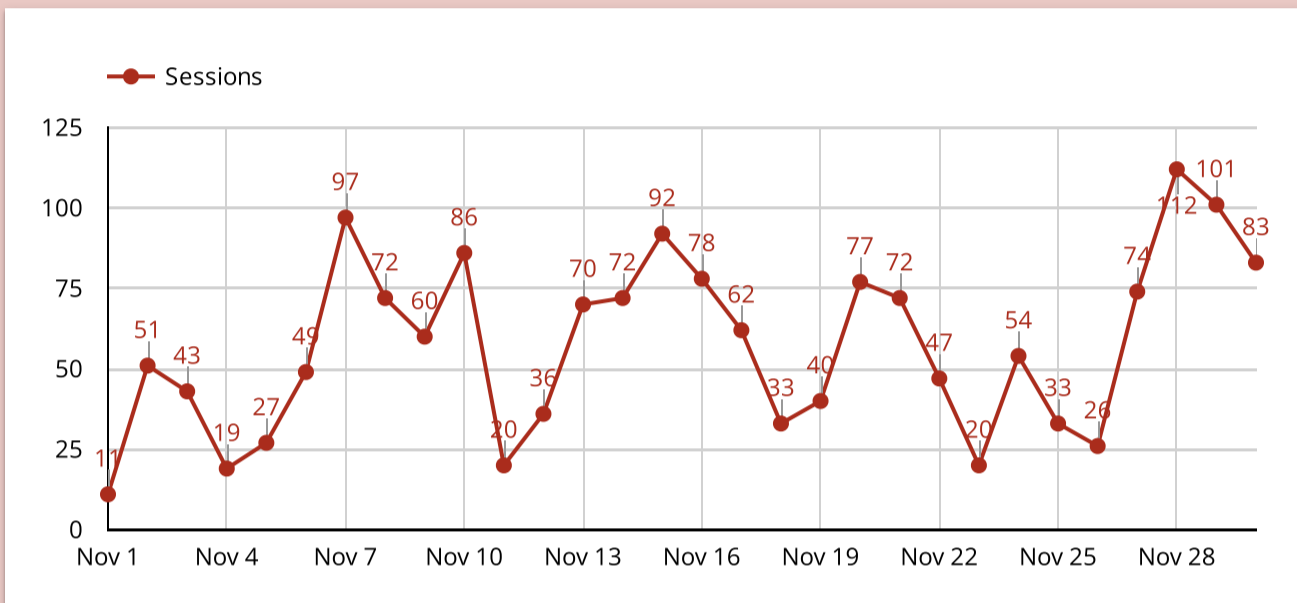
Sessions  
**1,717**  
↑ N/A

Engaged sessions  
**1,009**  
↑ N/A

Avg session duration  
**02:49**  
↑ N/A

Views  
**3,238**  
No data

## How are site sessions trending over the month?



## What are the top cities by sessions?

City	Sessions	Views
Pittsburgh	329	636
(not set)	182	272
Ashburn	125	224
New York	115	218
Hampton Township	77	169
Ross Township	49	110
McCandless	42	86
Scott Township	21	45
Glenshaw	21	31
Moses Lake	21	22
Philadelphia	20	24
<b>Grand total</b>	<b>1,717</b>	<b>3,238</b>

1 - 100 / 384 < >

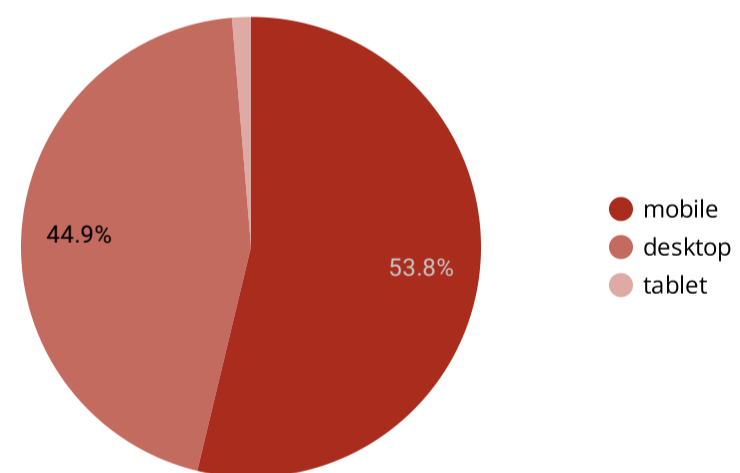
## Which channels are driving engagement?

Goal: Engaged Users

Session default channel group	Sessions	Engaged sessions	Total users
1. Organic Search	782	525	552
2. Direct	513	210	418
3. Referral	355	239	264
4. Organic Social	64	32	61
5. Unassigned	1	0	1
<b>Grand total</b>	<b>1,717</b>	<b>1,009</b>	<b>1,276</b>

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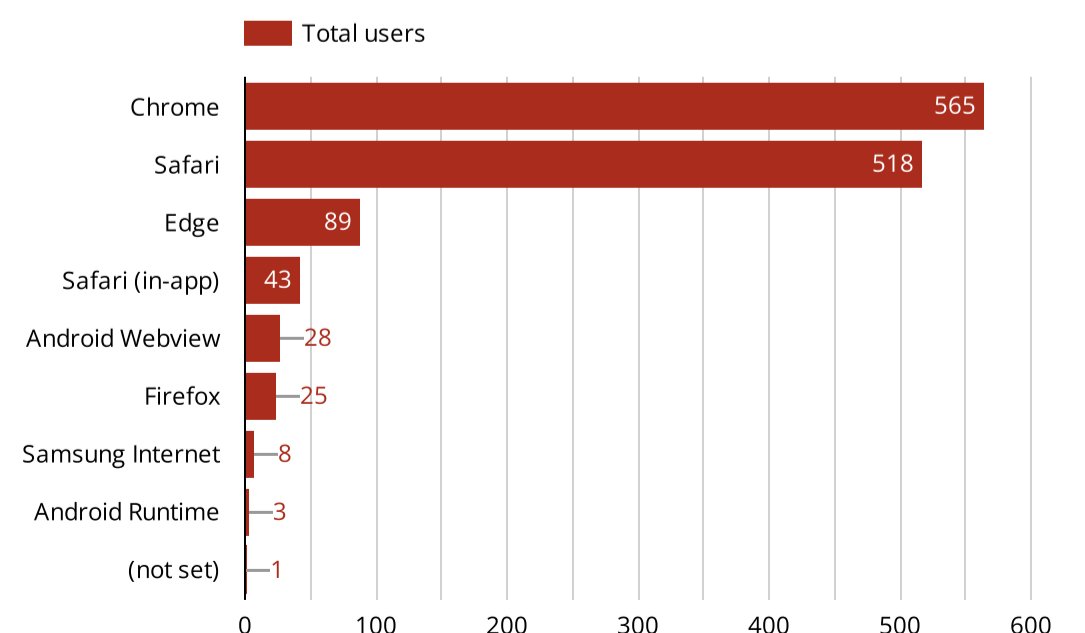
## Users by device & browser



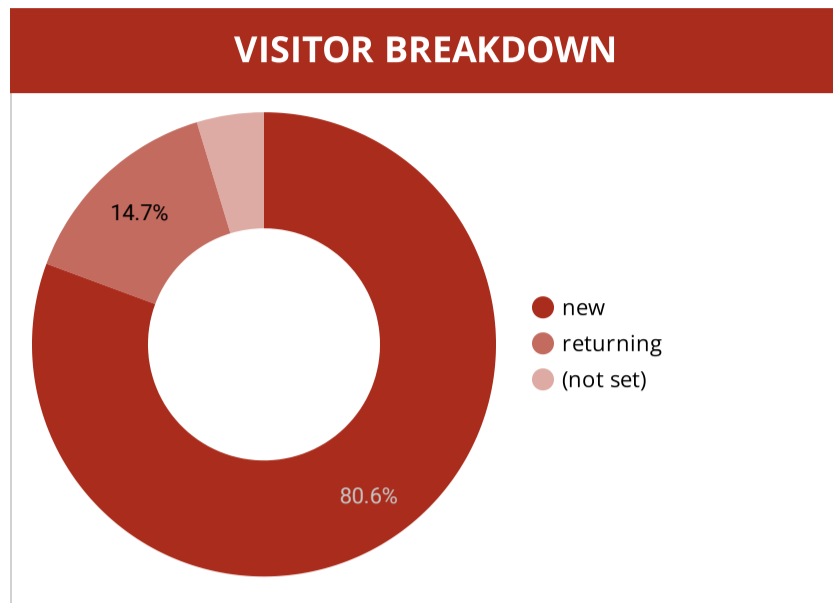
## Which external sites refer traffic?

Page referrer	Total users	Engaged sessions
1. https://www.google.com/	506	463
2.	445	260
3. https://www.bing.com/	41	33
4. http://m.facebook.com/	23	14
5. https://www.facebook.com/	22	5
6. https://www.pa211.org/	12	10
7. https://search.yahoo.com/	9	8
8. https://lm.facebook.com/	8	6
9. https://duckduckgo.com/	6	7
10. https://l.facebook.com/	6	5
11. https://allegHENY.pa.networkofcare.org/	3	2
<b>Grand total</b>	<b>1,040</b>	<b>796</b>

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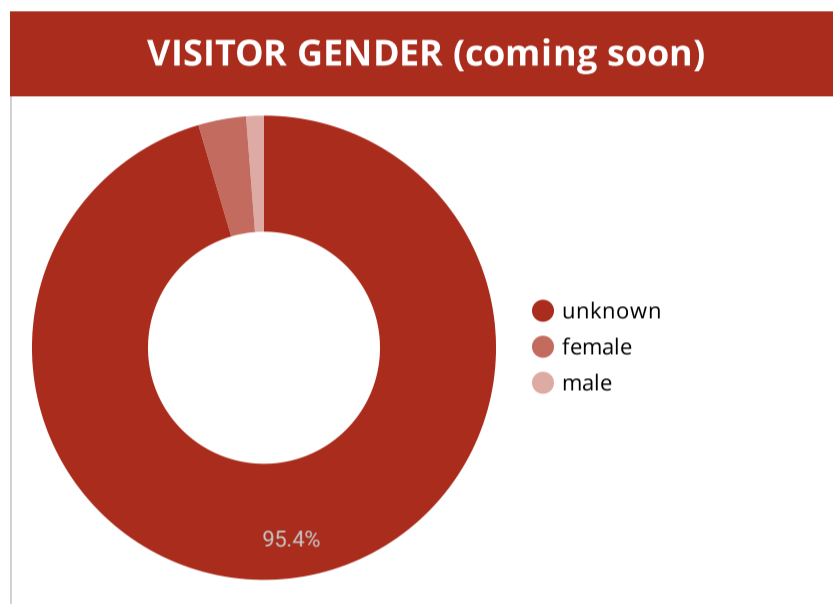
## Who is visiting and engaging with your website?



### VISITOR ENGAGEMENT BY TYPE

New / returning	Total users	Views	Average session duration	Bounce rate
new	1,275	2,591	00:02:50	33.91%
returning	232	569	00:03:34	52.19%
(not set)	74	78	00:00:02	100%
<b>Grand total</b>	<b>1,276</b>	<b>3,238</b>	<b>00:02:49</b>	<b>41.23%</b>

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### VISITOR ENGAGEMENT BY TYPE (coming soon)

Age	Total users	Sessions	Average session duration
unknown	1,242	1,650	00:02:46
45-54	12	16	00:03:27
<b>Grand total</b>	<b>1,247</b>	<b>1,667</b>	<b>00:02:47</b>

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### VISITOR ENGAGEMENT BY SOURCE/MEDIUM

Session source / medium	Total users	Sessions	Engaged sessions
google / organic	494	707	472
(direct) / (none)	418	513	210
hearthpgh.org / referral	240	292	212
bing / organic	40	49	32
m.facebook.com / referral	23	25	14
facebook.com / referral	22	22	5
hearthpgh.wpengine.com / referral	21	30	5
pa211.org / referral	11	15	10
yahoo / organic	9	10	7
lm.facebook.com / referral	8	8	6
duckduckgo / organic	6	8	7
l.facebook.com / referral	4	5	4
alleggheny.pa.networkofcare.org / referral	3	5	3
l.instagram.com / referral	3	3	2
widgets.mindbodyonline.com / referral	2	2	1
ecosia.org / organic	1	5	4
aol / organic	1	2	2
denmont.com / referral	1	1	1
findhelp.org / referral	1	1	1
<b>Grand total</b>	<b>1,276</b>	<b>1,717</b>	<b>1,009</b>

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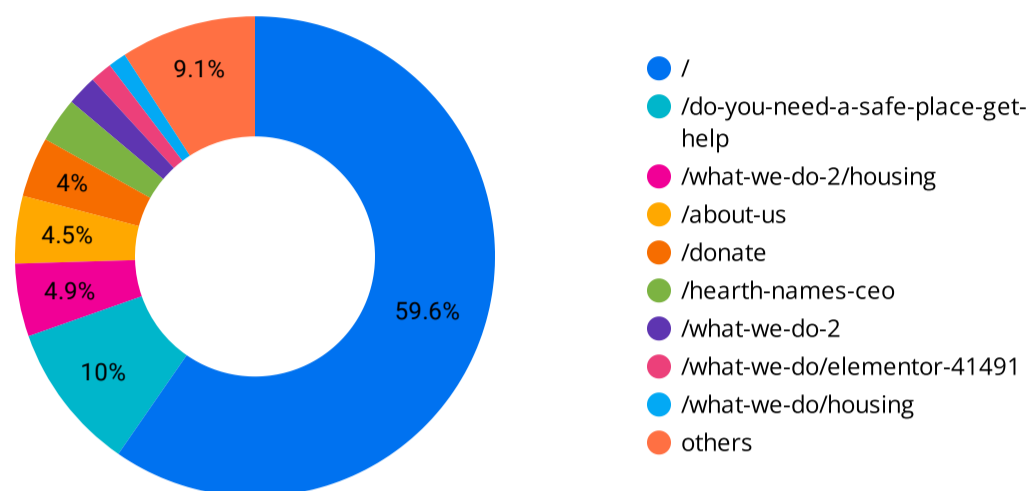
### EVENT OVERVIEW

Event name	Total users	Sessions	Event count
page_view	1,276	1,612	3,238
session_start	1,275	1,716	1,717
first_visit	1,275	1,277	1,276
user_engagement	817	1,022	2,162
scroll	521	597	938
click	385	416	598
form_start	60	63	74
page_submit	39	39	39
file_download	21	22	26
form_submit	7	10	14
view_search_results	1	1	1
<b>Grand total</b>	<b>1,276</b>	<b>1,717</b>	<b>10,083</b>

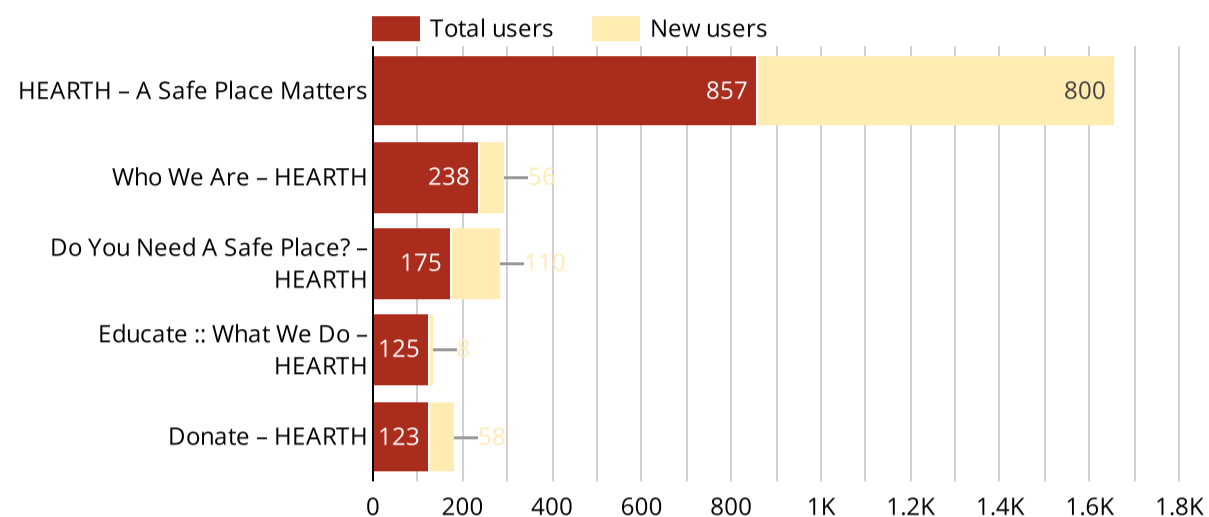
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## What content are visitors consuming when visiting?

### Which landing pages are most popular?



### Most popular pages broken down by page title



Page path	Views	Bounce rate
1. /	1,293	37.06%
2. /about-us/	329	17.35%
3. /do-you-need-a-safe-place-get-help/	263	21.15%
4. /what-we-do/	176	16.88%
5. /donate/	174	14.79%
6. /what-we-do/housing/	161	17.14%
7. /volunteer/	96	32%
8. /about-us/board-of-directors/	89	11.76%
9. /fundraisers/	89	11.25%
10. /what-we-do-2/housing/	78	25.4%
<b>Grand total</b>	<b>3,238</b>	<b>41.23%</b>

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Page title	Views	Bounce rate
1. HEARTH - A Safe Place Matters	1,292	37.06%
2. Who We Are - HEARTH	329	17.35%
3. Do You Need A Safe Place? - HEARTH	263	21.15%
4. Educate :: What We Do - HEARTH	176	16.88%
5. Donate - HEARTH	174	14.79%
6. Housing - HEARTH	161	17.14%
7. Page not found - HEARTH	139	27.62%
8. Volunteer - HEARTH	96	32%
9. Board of Directors - HEARTH	89	11.76%
10. Signature Fundraisers - HEARTH	89	11.25%
<b>Grand total</b>	<b>3,238</b>	<b>41.23%</b>

1 - 10 / 41 < >

### Landing Page by Session Source

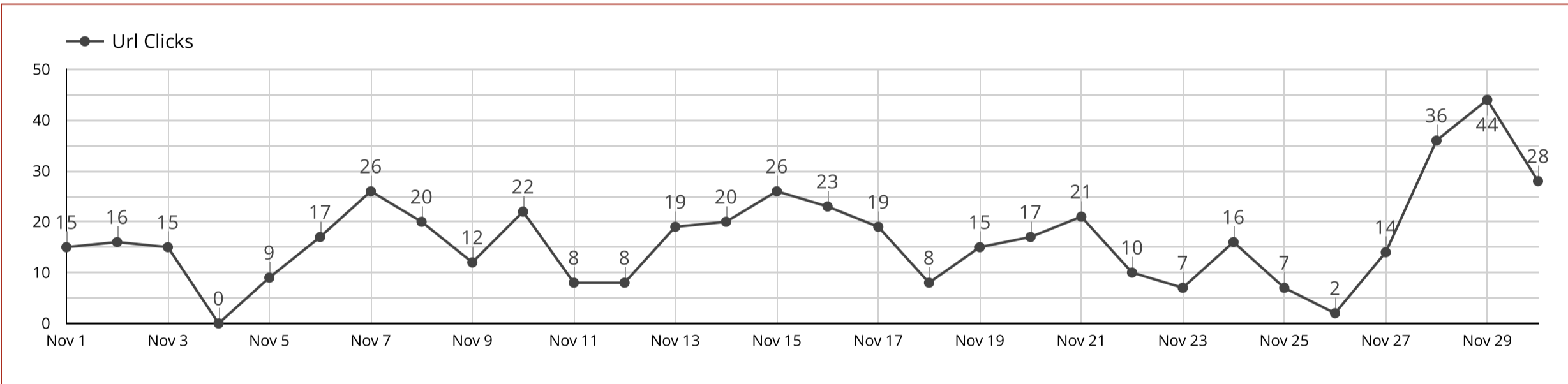
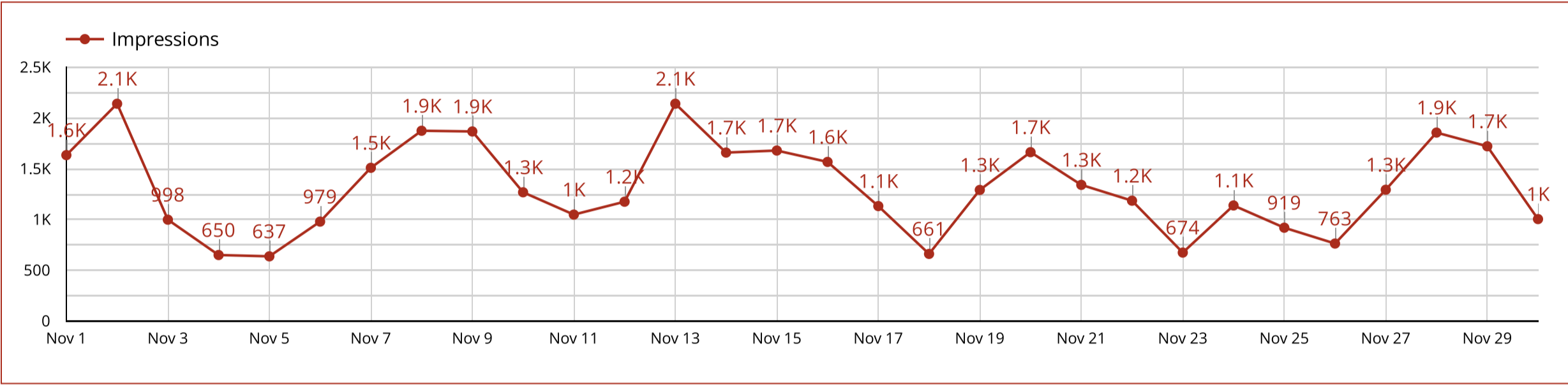
Session default channel group	Landing page	Total users	Sessions
1. Organic Search	/	445	537
2. Direct	/	318	367
3. Referral	/do-you-need-a-safe-place-get-help	99	115
4. Organic Search	(not set)	56	60
5. Referral	/what-we-do-2/housing	54	54
6. Referral	/donate	48	54
7. Organic Search	/about-us	44	46
8. Organic Social	/	37	39
9. Referral	/	30	38
10. Referral	/what-we-do-2	25	26
11. Referral	(not set)	25	25
<b>Grand total</b>		<b>1,276</b>	<b>1,717</b>

1 - 79 / 79 < >

Impressions  
**39,465**  
 ↑ 3,449.0%

Clicks to Site  
**500**  
 ↑ 3,471.4%

Average Position  
**13.64**  
 ↓ -1.0%



Query	Impressions	Clicks	Avg position
1. hearth	27,589	102	11.98
2. hearth pittsburgh	1,020	90	1.84
3. hearth and home	361	0	8.33
4. hearth program	244	9	4.56
5. heartg	168	0	10.5
6. hearths	165	0	55.93
7. hearth house	140	5	23.97
8. hearth home	134	11	3.66
9. home and hearth	94	0	6.79
10. longue vue golf club	78	0	71.37
11. every superhero needs a sidekick	71	0	9.93
12. sidekick meaning	70	0	81.19
13. hesrth	68	0	11.82
14. hearth inc	68	0	7.15
<b>Grand total</b>	<b>39,465</b>	<b>500</b>	<b>13.64</b>

1 - 100 / 530 < >

Query	Landing Page	Clicks
1. hearth	https://hearthpgh.org/	101
2. hearth pittsburgh	https://hearthpgh.org/	77
3. hearth home	https://hearthpgh.org/	11
4. hearth program	https://hearthpgh.org/	8
5. hearth pittsburgh	https://hearthpgh.org/about-us/	7
6. hearth address	https://hearthpgh.org/contacts/	4
7. hearth pgh	https://hearthpgh.org/	4
8. hearth house	https://hearthpgh.org/	4
9. north hills affordable housing	https://hearthpgh.org/	3
10. hearth housing program	https://hearthpgh.org/	2
11. hearth women's shelter pittsburgh	https://hearthpgh.org/	2
12. hearth shelter	https://hearthpgh.org/	2
<b>Grand total</b>		<b>500</b>

1 - 100 / 786 < >

## PAGE OVERVIEW

Total Followers <b>1,872</b>	Total Page Likes <b>1,796</b> ↓ -1.9%	Total People Who Viewed <b>69</b> ↓ -31.0%	Post Engagement Total <b>334</b> ↓ -50.7%
---------------------------------	---------------------------------------------	--------------------------------------------------	-------------------------------------------------

### Discovery

Post reach (last 28 days)	2,057
Post engagement	334
New Page likes	6
New Page Followers	5

### Interactions

Reactions	158
Comments	19
Shares	21
Link clicks	9

Date Published	Picture	Post	Type	Post Clicks	Comments - On Post	Post Reach (lifetime)	Post Engagement
1. Nov 17, 2023, 2PM		A round of applause for Morgan Cable, our Community Engagement Coordinator and Reagan Mickey, HEARTH Young Professional Board member, on winning the Western PA Rising Stars of 2023 award! 🏆🌟  Your dedication, passion, and unwavering support of our mission have not only shone within our organization but are now being recognized on a broader stage. We are immensely proud to have both of you on our team, and this achievement is a testament to your outstanding contributions to our HEARTH community.  Thank you Get Involved!, Inc for honoring our hard working community members at the 14th Annual Pittsburgh Service Summit!  #RisingStar #ServiceSummit #Congratulations #ASafePlaceMatters #HEARTH	added_photos	45	6	498	83
2. Nov 1, 2023, 3PM		We are overjoyed to extend our gratitude to North Hills Art Center for our incredible partnership during their Holiday Artisan Market. 🌟 We're proud to be a part of this wonderful initiative!  Thank you to the amazing team at North Hills Art Center and to everyone who visits the market and makes this partnership a success.  Check out the North Hills Art Center Holiday Artisan Market November 18th - December 9th! There's even a preview party on November 17th - be the first ones to shop with purpose. ♥  #HolidayArtisanMarket #NorthHillsArtCenter #HEARTH #ASafePlaceMatter #CommunitySupport	mobile_status_update	13	2	349	23
3. Nov 3, 2023, 2PM		Our team was thrilled to welcome Rep. Lindsay Powell into our HEARTH community!  Thank you for taking the time to visit, learn about who we are, and see the incredible work our team and community does. We are honored to stand with you in our mission of healing and empowerment! ♥  #ASafePlaceMatters #HEARTH #Thankyou	added_photos	12	0	305	30
4. Nov 28, 2023, 3PM		It's #GivingTuesday, a day of global generosity where we can give the gift of support to our community. When you choose to donate to HEARTH, you're choosing to provide families at HEARTH with life-changing opportunities for healing and growth.  Please make a gift today that will provide a safe place for mothers and children who have experienced homelessness and domestic violence: <a href="https://hearth.salsalabs.org/2023EndofYearAppeal/">https://hearth.salsalabs.org/2023EndofYearAppeal/</a>  #GivingTuesday #HEARTH #ASafePlaceMatters #CommunitySupport	added_photos	12	0	509	33
5. Nov 15, 2023, 7PM		Our kiddos have poured their hearts into creating beautiful family artwork, and we want YOU to be a part of the celebration! 🎨  Swipe through these heartwarming masterpieces crafted by our sweet HEARTH children. Your likes, comments, and shares not only recognize their creativity but also amplify the healing.	added_photos	11	0	260	23
<b>Grand total</b>				<b>131</b>	<b>10</b>	<b>3,538</b>	<b>301</b>

## PAGE OVERVIEW

Total Page Followers:1,050



## TOP POSTS

	Date And Time	Media URL	Caption	Media Type	Lifetime Reach	Like Count	Comments Count
1.	Nov 17, 2023, 2PM		<p>A round of applause for Morgan Cable, our Community Engagement Coordinator and Reagan Mickey, HEARTH Young Professional Board member, on winning the Western PA Rising Stars of 2023 award! 🏆🌟</p> <p>Your dedication, passion, and unwavering support of our mission have not only shone within our organization but are now being recognized on a broader stage. We are immensely proud to have both of you on our team, and this achievement is a testament to your outstanding contributions to our HEARTH community.</p> <p>Thank you @getinvolvedinc for honoring our hard working community members at the 14th Annual Pittsburgh Service Summit!</p> <p>#RisingStar #ServiceSummit #Congratulations #ASafePlaceMatters #HEARTH</p>	CAROUSEL_ALBUM	181	34	5
2.	Nov 29, 2023, 6PM		<p>Get ready to sleigh the night away at our Ugly Sweater Holiday Party! 🌟 Join our Young Professionals Board on Saturday, December 2nd from 5-8pm at @thebar11 for the jolliest event of the season.</p> <p>We are challenging you to showcase your best festive sweater creation in our Ugliest Sweater Contest!</p> <p>Mark your calendars, grab your friends, and let's get together this holiday season for a good cause. 🌟🎁</p> <p>#UglySweaterHolidayParty #HEARTH #ASafePlaceMatters #YoungProfessionals</p>	IMAGE	179	19	0
3.	Nov 1, 2023, 3PM		<p>We are overjoyed to extend our gratitude to @northhillsartcenter for our incredible partnership during their Holiday Artisan Market. 🌟 We're proud to be a part of this wonderful initiative!</p> <p>Thank you to the amazing team at North Hills Art Center and to everyone who visits the market and makes this partnership a success.</p> <p>Check out the North Hills Art Center Holiday Artisan Market November 18th - December 9th! There's even a preview party on November 17th - be the first ones to shop with purpose. ♥</p> <p>#HolidayArtisanMarket #NorthHillsArtCenter #HEARTH #ASafePlaceMatter #CommunitySupport</p>	IMAGE	167	11	0
4.	Nov 8, 2023, 8PM		<p>Thank you, Anette Nance, the Executive Director of the Governor's Advisory Commission on African American Affairs, for taking the time to visit HEARTH, learn about our mission, and share in our commitment to our families together.</p> <p>We extend our heartfelt gratitude to @mrsnance_ for her compassion, advocacy, and dedication to the community. Your visit has further fueled our determination to create positive change and support for the mothers and children we serve. ♥</p> <p>#HEARTH #ASafePlaceMatters #CommunitySupport #Advocacy</p>	IMAGE	159	13	0
5.	Nov 22, 2023, 4PM		<p>We are overwhelmed with gratitude as we extend a warm thank you to the Art Rooney Council of the Knights of Columbus for once again generously donating Thanksgiving meals to our families. Your continued support means the world to us!</p> <p>Together, we're creating a community of care and compassion. Thank you for your kindness during this season of giving. ♥🙏</p> <p>We hope you all have a wonderful holiday!</p> <p>#CommunityPartnership #Gratitude #ASafePlaceMatters #HEARTH</p>	IMAGE	152	20	0
6.	Nov 3, 2023, 2PM		<p>Our team was thrilled to welcome @reppowell into our HEARTH community!</p> <p>Thank you for taking the time to visit, learn about who we are, and see the incredible work our team and community does. We are honored to stand with you in our mission of healing and empowerment! ♥</p> <p>#ASafePlaceMatters #HEARTH #Thankyou</p>	IMAGE	151	21	0
<b>Grand total</b>					<b>1,844</b>	<b>217</b>	<b>5</b>

## Company Page Overview




<b>Impressions</b> <b>2,989</b> <span style="color: green;">↑ 53.8%</span>	<b>All page views</b> <b>76</b> <span style="color: red;">↓ -13.6%</span>	<b>All unique visitors</b> <b>43</b> <span style="color: red;">↓ -8.5%</span>	<b>Visite website clicks</b> <b>4</b> <span style="color: red;">↓ -20.0%</span>
----------------------------------------------------------------------------------	---------------------------------------------------------------------------------	-------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------

## Follower Overview

<b>Total followers</b> <b>504</b>	<b>New followers</b> <b>10</b> <span style="color: red;">↓ -41.2%</span>
--------------------------------------	--------------------------------------------------------------------------------

## Post Analytics

<b>#</b> <b>15</b> <span style="color: green;">↑ 15.4%</span>	<b>Reactions</b> <b>137</b> <span style="color: green;">↑ 57.5%</span>	<b>Clicks</b> <b>107</b> <span style="color: green;">↑ 12.6%</span>	<b>Comments</b> <b>5</b> <span style="color: green;">↑ 66.7%</span>	<b>Shares</b> <b>5</b> <span style="color: green;">0.0%</span>
---------------------------------------------------------------------	------------------------------------------------------------------------------	---------------------------------------------------------------------------	---------------------------------------------------------------------------	----------------------------------------------------------------------

First publish...	Media URL	Post content	Impressions	Clicks	Comments
Dec 4, 2023, 8...		We couldn't be prouder to extend our heartfelt thanks to Lorelei for her i...	220	58	1
Dec 25, 2023, ...		We wanted to take a moment to extend warm wishes and gratitude from ...	168	20	1
Dec 18, 2023, ...		As the holiday season approaches, our hearts are filled with immense gr...	87	13	0
Dec 20, 2023, ...		Calling all passionate individuals ready to make a difference: We're expa...	481	10	0
Dec 22, 2023, ...		Our community wants to give a huge shoutout to the incredible Norwin S...	75	6	0
Dec 8, 2023, 3...	 <p><b>“Because of HEARTH, we have gone from barely surviving to thriving.”</b></p> <p>— TABITHA</p> <p><small>Tabitha speaking at HEARTH's Hats Off event in 2023</small></p>	This holiday season, let's come together to make a meaningful differenc...	103	2	0
Dec 15, 2023, ...		We're thrilled to share the incredible news of our graduating families wh...	228	1	0



**DATE RANGE:**

Oct 1, 2022 - Jan 12, 2024

**152**

Volunteers Volunteered



**650.33**

Hours Volunteered



**58**

Events Attended

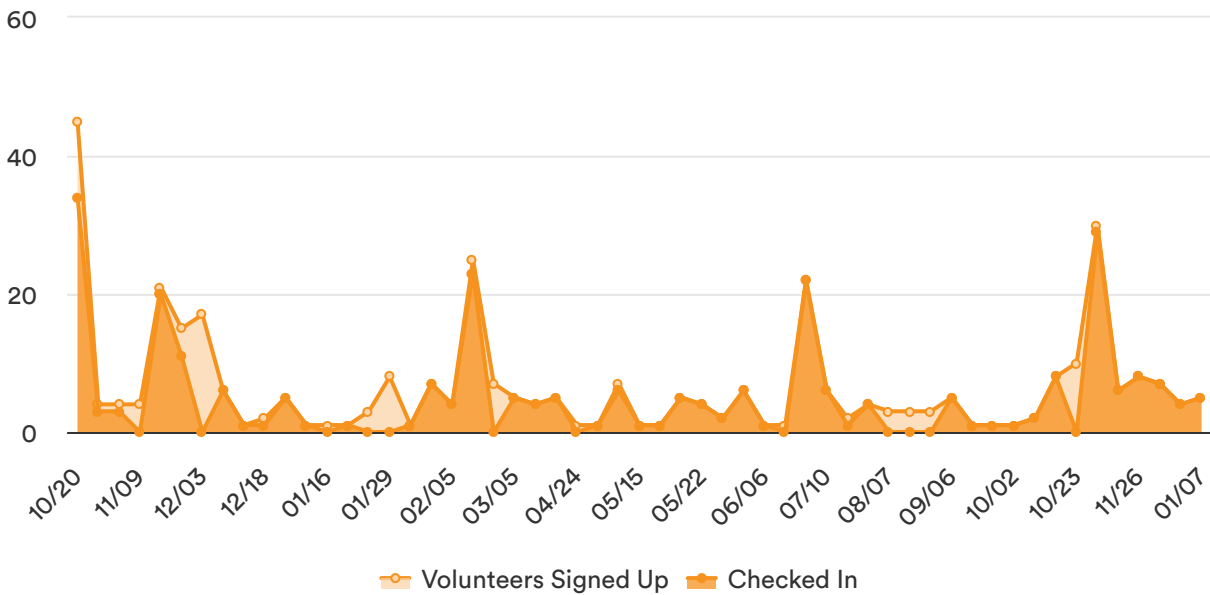


**\$19.97k**

Economic Impact



**EVENT ATTENDANCE ACTIVITY**



### TOP VOLUNTEERS



Diane Bickford

38.00 h



Reagan Mickey

25.33 h



Diya Sonth

13.75 h



Ridhima Bhimavarapu

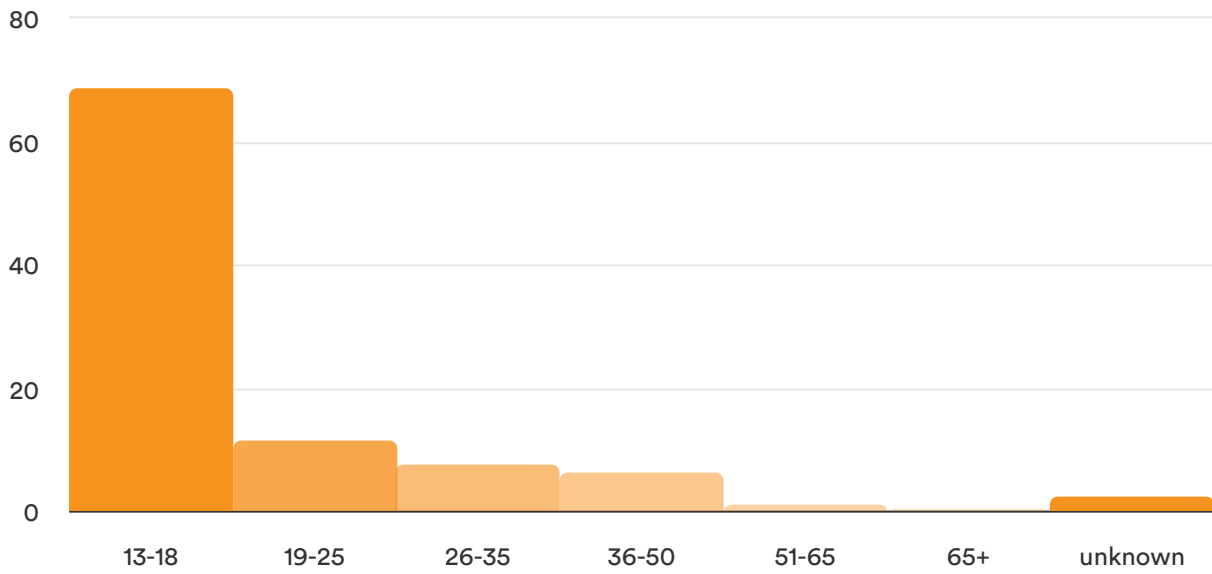
12.08 h



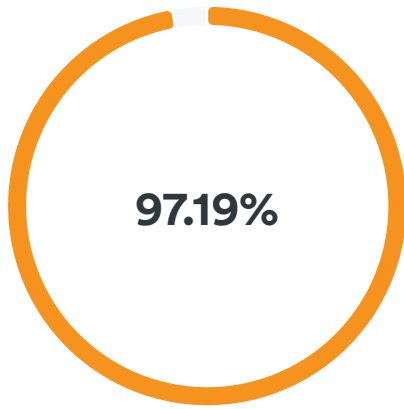
Kyra Malhotra

11.42 h

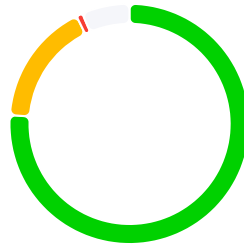
### VOLUNTEER AGES



## VOLUNTEERS EVENTS ACTIVITY

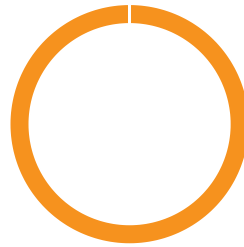


Volunteer Event Signups



### Event Attendance

- 76.19%** Checked in
- 16.53%** Signed Up
- 0.84%** No Show
- 6.44%** Canceled



### Event Hosts


- 100%** Your Organization
- 0%** Co Hosts
- 0%** Other Organizations



## 2023-2024 Grants Received

(as of 12/31/2023)

Funder	Amount	Date	Report Due & Notes
United Way	\$50,000.00		Ongoing and 3 year committment of \$150,000 - payments will be sent monthly by ACH
Massey Charitable Trust	\$15,000.00	6/15/2023	6/2024
Eden Hall	\$5,000.00	6/1/2023	Descressionary Fund through LOI submitted in May
PNC Charitable Trust - Mendel & Sylvia Solomd	\$20,000.00	6/23/2023	6/2024
Donald & Sylvia Robinson Family Foundation	\$1,000.00	7/1/2023	Unsolicited
Centimark Foundation	\$10,000.00	7/25/2023	Unsolicited
UWSWPA - Impact Fund	\$4,166.68	7/25/2023	Payment #1 - monthly Impact grant
Howmet Aerospace Foundation	\$20,000.00	8/7/2023	Workforce Development - Final Report due 6/30/2024
UWSWPA - Impact Fund	\$4,166.68	8/12/2023	Payment #2 - monthly Impact Grant
The Ann & Frank Cahouet Foundation	\$5,000.00	9/5/2023	Unsolicited - Report Due 5/1/2024 - email
UWSWPA - Impact Fund	\$4,166.68	9/12/2023	Payment #3 - monthly Impact grant
The Anne L & George H. Clapp Charitable & Educational Trust - BNY Mellon Wealth Management	\$5,000.00	10/2/2023	Unsolicited - No report - send touch point in 2024
UWSWPA - Impact Fund	\$4,166.67	10/12/2023	Payment # 4 - Monthly Impact Grant
FISA	\$25,000.00	10/16/2023	Report Due 11/29/2024
AMCS	\$10,500.00	10/26/2023	Report and expenditure by 12/2024 - Requested \$20K
UWSWPA - Impact Fund	\$4,166.67	11/9/2023	Payment #5 - Monthly Impact Grant
Pittsburgh Child Guidance Foundation	\$10,000.00	11/20/2023	Report Due 10/1/2024
Centimark Foundation	\$3,000.00	11/20/2023	Unsolicited - EOY Holiday Giving
Community Foundation	\$25,000.00	11/20/2023	Insolicited at the request of Sandy Fowler Jones of Swedish Match
UWSWPA - Impact Fund	\$4,166.67	12/8/2023	Payment # 6 - Monthly Impact Grant
Thomas Marshal Foundation	\$5,000.00	12/13/2023	LOI Sent - Small touchpoint to be sent 6/2024
The Anne R. Monroe Foundation	\$5,150.00	12/13/2023	Unsolicited, Megan's Dad , no report necessary
Hillman Foundation	\$75,000.00	12/15/2023	Report Due 1/31/2025
Giving 2 Grow	\$5,000.00	12/31/2023	Report Due - 2023 Funding final report due 1/31/2024 - 2024 funding report will be due 1/2025
Donald & Sylvia Robinson Family Foundation	\$2,000.00	12/19/2023	Unsolicited - end of year additional gift
Howard Family Fund of The Pittsburgh Found	\$500.00	12/20/2023	Family Fund - Unsolicited - no report due
Wesco Charitable Foundation	\$5,000.00	12/26/2023	Unsolicited - EOY gift
UWSWPA - Impact Fund	\$4,166.67	1/10/2024	Payment # 7 - Monthly Impact Grant
<b>as of 12/31/2023</b>			
<b>FY 2023-2024</b>		<b>\$241,316.72</b>	

		Expected/In Progress Grants 2023-2024
Funder	Amount	Notes
<b>Submitted</b>		
Robert S and Louise S Kahn Foundation	\$20,000.00	Submitted 9/2023 - decision in early 2024
Scaife Family Foundation	\$15,000.00	Submitted 10/30/2023 - decision in early 2024
A J & Sigismunda Palumbo Charitable	\$35,000.00	Submitted 10/30/2023 - Trustees meet in March
Richard King Mellon Foundation	\$25,000.00	Submitted 11/2023 - decision erarly 2024
<b>United Way - 5 months of monthly funding</b>	<b>\$20,833.35</b>	1 year of 3 year committment (\$50K total)
	<b>\$115,833.35</b>	
<b>Upcoming</b>		
Bank Of America	\$10,000.00	RFP opens 1/22/2024 - request amount not finalized
Snee Reinhardt	\$5,000.00	Due 4/1/2024
Arconic Apollo Fund	\$5,000.00	Feb 1 - reaching out to determine proper request amount
	<b>\$20,000.00</b>	
<b>State Grant</b>		
PA Housing Affordability Fund - PHARE Program	\$350,000.00	Announced in May
<b>Grand Total</b>	<b>\$485,833.35</b>	Estimate pending upcoming
Foundation and Grant money received to date	\$241,316.72	
2023-2024 Foundation Budget Amount	\$300,000.00	
2023-2024 Grant Budget Amount	\$50,000.00	
Needed to reach budget	<b>\$108,683.28</b>	
In to date - 1/11/2024	<b>\$241,316.72</b>	
Expected through June 30 (not including PHFA)	<b>\$135,833.35</b>	
	<b>\$377,150.07</b>	

## **2023-24 Fiscal Year: First Half Review**

### **Income Statement (page 2-4)**

1. Revenue: \$597K or \$79K (12%) under budget.
  - a. Grants were \$210K versus \$0 budgeted amount.
  - b. Grant revenue offset material budget shortfalls in other major revenue categories.
    - i. Individual and Annual Appeal contributions were \$87K versus \$163K budget, a \$76K shortfall.
    - ii. Foundation Donations were \$37K versus \$150K budget, a \$111K shortfall.
    - iii. Net Wine and Food revenue was \$63K versus \$115K budget, a \$52K shortfall.
    - iv. Miscellaneous Income was \$56K versus budget \$128 budget, a \$72K shortfall.
  - c. *Management Comments: to be provided at meeting.*
2. Expenses: Total expenses were \$599K or \$80K (12%) under budget for the first half.
  - a. Salaries were \$258K versus \$300 budget, a \$41K benefit versus budget.
  - b. Mt. Royal Rent was \$101K versus \$128 budget, a \$27K benefit versus budget.
  - c. *Management Comments: to be provided at meeting.*
3. Net Result: Net Loss for the first half was \$34K versus budgeted net loss of \$2K.

### **Statement of Cash Flow (page 5)**

1. Net cash increased \$270K for the quarter.
  - a. Accounts receivable declined \$252K, reflecting the return of \$259K from the Commonwealth (dormant bank account).

### **Statement of Financial Position (page 6 and 7)**

1. Total assets were relatively stable for the first half at \$3.71 million consistent with the small loss for the first half of this fiscal year.
  - a. Accounts receivable declined \$251K and Fidelity Investments increased \$300K.
  - b. Bank balances were reduced to \$372K consistent with this recommendation approved by the Board in 4Q 2023: *“The Committee and Management recommend the minimum target level for aggregate bank accounts be set at \$300K, which is approximately one quarter of run-rate expenses.”*

### **Full Fiscal Year Outlook (see page 8)**

# HEARTH

## Budget vs. Actuals: 2023-2024 - FY24 P&L

July - December, 2023

	ACTUAL	TOTAL	
		BUDGET	OVER BUDGET
<b>Revenue</b>			
4001 Individual	86,962.73	124,999.98	-38,037.25
4005 Annual Appeal		37,500.00	-37,500.00
4009 Spring Appeal		7,500.00	-7,500.00
4010 Business Donation	6,268.85	15,000.00	-8,731.15
4020 Foundation Donations	38,668.49	150,000.00	-111,331.51
4030 Organizations - Donations	6,132.71	7,500.00	-1,367.29
4050 Religious Organizations - Donations	7,264.00	4,999.98	2,264.02
4070 United Way - Donations	30,566.63	10,000.02	20,566.61
4100 Grants	209,900.00		209,900.00
4120 HUD Reimbursements	798.00	4,000.02	-3,202.02
4220 Late & Other Fees	60.00		60.00
4300 Misc. Income	55,667.17	127,758.00	-72,090.83
4305 Management Fee	4,611.46		4,611.46
4330 Interest Income	39,528.01	40,000.02	-472.01
4480 YPB Events/Fundraising	2,856.00		2,856.00
4500 Boiler Bldg Rent		15,840.00	-15,840.00
4600 Wine & Food		115,000.00	-115,000.00
4610 Wine & Food Tickets	9,568.82		9,568.82
4615 Wine & Food Donations	12,076.66		12,076.66
4620 Wine & Food Sponsors	82,250.00		82,250.00
<b>Total 4600 Wine &amp; Food</b>	<b>103,895.48</b>	<b>115,000.00</b>	<b>-11,104.52</b>
4700 Golf-Parent acct		0.00	0.00
4750 Golf Donations	7,959.38		7,959.38
4790 Golf Expenses	-5,000.00		-5,000.00
<b>Total 4700 Golf-Parent acct</b>	<b>2,959.38</b>	<b>0.00</b>	<b>2,959.38</b>
4940 Assoc Board Fundraiser	6,487.75	1,249.98	5,237.77
4950 Program Fees	24,673.54	15,000.00	9,673.54
Markup	-613.00		-613.00
Sales	11,631.57		11,631.57
<b>Total Revenue</b>	<b>\$638,318.77</b>	<b>\$676,348.00</b>	<b>\$ -38,029.23</b>
<b>Cost of Goods Sold</b>			
4690 COS-Wine & Food	41,190.54		41,190.54
<b>Total Cost of Goods Sold</b>	<b>\$41,190.54</b>	<b>\$0.00</b>	<b>\$41,190.54</b>
<b>GROSS PROFIT</b>	<b>\$597,128.23</b>	<b>\$676,348.00</b>	<b>\$ -79,219.77</b>
<b>Expenditures</b>			
7010 Board Development	29.19		29.19
7015 D&O Insurance	0.00		0.00
7020 Donor/Volunteer Relations	737.36	750.00	-12.64
7025 Memberships/Educ. Material	1,483.34	2,500.02	-1,016.68
7030 Equipment Maint/Repair	-265.00		-265.00
7035 Internet	-4,219.29	450.00	-4,669.29

# HEARTH

## Budget vs. Actuals: 2023-2024 - FY24 P&L

July - December, 2023

	TOTAL		
	ACTUAL	BUDGET	OVER BUDGET
7040 Bank Service Chgrs	1,194.45	750.00	444.45
7045 Office Equipment		750.00	-750.00
7050 Office Supplies	4,390.87	1,999.98	2,390.89
7055 Telephone Expense	2,695.12	3,000.00	-304.88
7060 Postage/Delivery	734.49	750.00	-15.51
7065 Printing/Copying	313.70	499.98	-186.28
7070 Bad Debt Expense		600.00	-600.00
7075 Software Maintenance/Support	13,156.88	3,250.02	9,906.86
7080 Staff Recognition	355.27	2,500.02	-2,144.75
7085 Staff Recruitment	385.94	250.02	135.92
7090 Technical Support	2,160.00	3,499.98	-1,339.98
7095 Website		499.98	-499.98
7110 Audit	15,850.00	10,000.02	5,849.98
7140 Charitable Registration	350.00	150.00	200.00
7160 Misc. Expense		75.00	-75.00
7170 Payroll Service	1,648.00		1,648.00
7180 403b Administration	3,050.00	1,249.98	1,800.02
7190 Staff Conference/Seminar	1,084.09		1,084.09
7212 Real Estate Tax		8,868.00	-8,868.00
7215 Building Insurance	5,511.00	7,750.02	-2,239.02
7220 Janitorial Services		4,999.98	-4,999.98
7225 Cleaning Supplies	-282.76	400.02	-682.78
7230 Electricity	1,928.96	10,000.02	-8,071.06
7235 Exterminating	95.37		95.37
7245 Maintenance Labor	0.00		0.00
7246 Up Keep - Grounds		10,999.98	-10,999.98
7247 Snow Removal	1,006.83	8,500.02	-7,493.19
7250 Maintenance Supplies	4,352.51	6,000.00	-1,647.49
7255 Natural Gas	1,109.31	4,350.00	-3,240.69
7265 Rent-Benedictine Place	18,810.00		18,810.00
7267 Rent - Mt Royal	100,955.00	127,758.00	-26,803.00
7270 Sewage	0.00	3,900.00	-3,900.00
7275 Trash Removal	2,088.98	6,000.00	-3,911.02
7280 Water	0.00	3,900.00	-3,900.00
7290 Equipment		1,000.02	-1,000.02
7295 Security	-1,215.28	2,500.02	-3,715.30
7303 Apt Equip & Supplies	837.14		837.14
7306 Auto Lease/Insurance/Gas	100.00		100.00
7309 Clearances Act 33 & 34	140.00	375.00	-235.00
7315 Client Expense	9,882.62		9,882.62
7323 Drug Testing	405.00		405.00
7330 Equipment-Prog staff		499.98	-499.98
7333 Food & Beverage Exp	1,172.63		1,172.63



# HEARTH

## Budget vs. Actuals: 2023-2024 - FY24 P&L

July - December, 2023

	TOTAL		
	ACTUAL	BUDGET	OVER BUDGET
7336 Food & Perishables-PP	1,194.39	499.98	694.41
7338 HEARTH at BW exps		600.00	-600.00
7341 Image Marketing	12,991.42	7,500.00	5,491.42
7350 Life Skills		750.00	-750.00
7360 Playground Maintenance		1,000.02	-1,000.02
7363 Postage-Program	150.00	250.02	-100.02
7366 Printing/Copying-Program	167.50	499.98	-332.48
7373 Program Outcome	66.00	7,500.00	-7,434.00
7376 Program Supplies	7,529.28		7,529.28
7385 Staff Auto Allow.-mileage/park	699.24	1,000.02	-300.78
7388 Storage/Shredding	3,890.51	1,500.00	2,390.51
7391 Tech Support-Program	339.02	900.00	-560.98
7394 Telephone	749.13	900.00	-150.87
7394 Telephone - Programming	720.94		720.94
7530 Fundraising	16,253.00	24,000.00	-7,747.00
7540 Medical Insurance	48,570.66	37,500.00	11,070.66
7541 Vision & Dental Insurance	266.90		266.90
7542 Life Insurance	4,807.92	4,500.00	307.92
7550 403 B Retirement	16,155.92	13,999.98	2,155.94
7570 Salaries	258,455.93	300,195.48	-41,739.55
7571 Consulting Fees	5,378.89	4,999.98	378.91
7575 FICA Employer	15,083.13	19,999.98	-4,916.85
7580 Medicare-Employer		4,399.98	-4,399.98
7582 Other Tax Expense	12,807.75	4,999.98	7,807.77
7590 Workers' Comp Insurance	0.00		0.00
Purchases	866.00		866.00
<b>Total Expenditures</b>	<b>\$599,175.25</b>	<b>\$678,821.46</b>	<b>\$ -79,646.21</b>
<b>NET OPERATING REVENUE</b>	<b>\$ -2,047.02</b>	<b>\$ -2,473.46</b>	<b>\$426.44</b>
<b>NET REVENUE</b>	<b>\$ -2,047.02</b>	<b>\$ -2,473.46</b>	<b>\$426.44</b>

# HEARTH

## Statement of Cash Flows

July - December, 2023

	TOTAL
<b>OPERATING ACTIVITIES</b>	
Net Revenue	-2,047.02
Adjustments to reconcile Net Revenue to Net Cash provided by operations:	
1100 Accounts Receivable	251,591.62
1410 Accrued Interest Rec. on Note	15,229.25
2000 Accounts Payable	-3,728.77
1340 Security Deposits	-300.00
2010 Payroll Liabilities	7,966.26
2112 403b Match	-3,473.05
2120 403b Contributions	5,039.68
<b>Total Adjustments to reconcile Net Revenue to Net Cash provided by operations:</b>	<b>272,324.99</b>
<b>Net cash provided by operating activities</b>	<b>\$270,277.97</b>
<b>INVESTING ACTIVITIES</b>	
1600 Capital Equipment	0.00
1080 Reserve Account	0.00
<b>Net cash provided by investing activities</b>	<b>\$0.00</b>
<b>NET CASH INCREASE FOR PERIOD</b>	<b>\$270,277.97</b>
Cash at beginning of period	1,959,213.76
<b>CASH AT END OF PERIOD</b>	<b>\$2,229,491.73</b>

# HEARTH

## Statement of Financial Position

As of December 31, 2023

	TOTAL		
	AS OF DEC 31, 2023	AS OF JUN 30, 2023 (PP)	CHANGE
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
1010 FNB - Checking #5258	371,165.76	133,315.56	237,850.20
1015 FNB- Cap. Camp. #7427	1,834.19	265,220.74	-263,386.55
1020 Citizens Money Market #235-3	10.00	10.00	0.00
1030 FNB-Money Mkt #6783	23,407.27	23,368.15	39.12
1045 Fidelity Investments	1,828,711.37	1,528,751.74	299,959.63
1052 S & T Bank Money Market #8622	0.00	0.00	0.00
1055 FNB 9679 - HSA	4,363.14	8,547.57	-4,184.43
<b>Total Bank Accounts</b>	<b>\$2,229,491.73</b>	<b>\$1,959,213.76</b>	<b>\$270,277.97</b>
Accounts Receivable			
1100 Accounts Receivable	120,223.48	371,815.10	-251,591.62
1410 Accrued Interest Rec. on Note	65,020.75	80,250.00	-15,229.25
<b>Total Accounts Receivable</b>	<b>\$185,244.23</b>	<b>\$452,065.10</b>	<b>\$ -266,820.87</b>
Other Current Assets			
1200 Undeposited Funds	0.00	0.00	0.00
1320 Prepaid Expenses	0.00	0.00	0.00
Uncategorized Asset	0.00	0.00	0.00
<b>Total Other Current Assets</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Current Assets</b>	<b>\$2,414,735.96</b>	<b>\$2,411,278.86</b>	<b>\$3,457.10</b>
Fixed Assets			
1600 Capital Equipment	112,404.04	112,404.04	0.00
1620 Furnishings	92,907.77	92,907.77	0.00
1680 Accumulated Depreciation	-130,759.62	-130,759.62	0.00
<b>Total Fixed Assets</b>	<b>\$74,552.19</b>	<b>\$74,552.19</b>	<b>\$0.00</b>
Other Assets			
1080 Reserve Account	0.00		0.00
1700 Allegheny Investments	0.00	0.00	0.00
1800 Investment In Partnership	100.00	100.00	0.00
1900 Noncurrent Note Receivable	1,070,000.00	1,070,000.00	0.00
1950 Noncurrent Accrued Interest Income	154,933.75	154,933.75	0.00
<b>Total Other Assets</b>	<b>\$1,225,033.75</b>	<b>\$1,225,033.75</b>	<b>\$0.00</b>
<b>TOTAL ASSETS</b>	<b>\$3,714,321.90</b>	<b>\$3,710,864.80</b>	<b>\$3,457.10</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Accounts Payable			
2000 Accounts Payable	42,111.49	45,840.26	-3,728.77
<b>Total Accounts Payable</b>	<b>\$42,111.49</b>	<b>\$45,840.26</b>	<b>\$ -3,728.77</b>
Other Current Liabilities			
1340 Security Deposits	11,531.37	11,831.37	-300.00

# HEARTH

## Statement of Financial Position

As of December 31, 2023

	TOTAL		
	AS OF DEC 31, 2023	AS OF JUN 30, 2023 (PP)	CHANGE
2010 Payroll Liabilities	22,872.62	14,906.36	7,966.26
2015 Deferred revenue W&F	-250.00	-250.00	0.00
2017 Deferred Rev.-Purses	3,500.00	3,500.00	0.00
2020 Sales tax payable	0.00	0.00	0.00
2112 403b Match	6,688.40	10,161.45	-3,473.05
2120 403b Contributions	9,862.11	4,822.43	5,039.68
<b>Total Other Current Liabilities</b>	<b>\$54,204.50</b>	<b>\$44,971.61</b>	<b>\$9,232.89</b>
<b>Total Current Liabilities</b>	<b>\$96,315.99</b>	<b>\$90,811.87</b>	<b>\$5,504.12</b>
Long-Term Liabilities			
2030 PPP SBA LOAN	0.00	0.00	0.00
<b>Total Long-Term Liabilities</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total Liabilities</b>	<b>\$96,315.99</b>	<b>\$90,811.87</b>	<b>\$5,504.12</b>
Equity			
3000 Retained Earnings	530,591.10	530,591.10	0.00
32000 Unrestricted Net Assets	3,089,461.83	3,089,461.83	0.00
Net Revenue	-2,047.02		-2,047.02
<b>Total Equity</b>	<b>\$3,618,005.91</b>	<b>\$3,620,052.93</b>	<b>\$ -2,047.02</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$3,714,321.90</b>	<b>\$3,710,864.80</b>	<b>\$3,457.10</b>

## HEARTH

	1H Actual FY 2023-24	Budget FY 2023-24	2H Need			
<b>Revenue</b>						
4001 Individual	\$86,963	\$250,000	\$163,037			
4005 Annual Appeal		\$75,000	\$75,000			
4009 Spring Appeal		\$15,000	\$15,000	\$131,900	\$670,000	\$538,100
4010 Business Donation	\$6,269	\$30,000	\$23,731			
4020 Foundation Donations	\$38,668	\$300,000	\$261,332			
4030 Organizations - Donations	\$6,133	\$15,000	\$8,867			
4050 Religious Organizations - Donations	\$7,264	\$10,000	\$2,736			
4070 United Way - Donations	\$30,567	\$20,000	-\$10,567			
4100 Grants	\$209,900		-\$209,900			
4120 HUD Reimbursements	\$798	\$8,000	\$7,202			
4220 Late & Other Fees	\$60		-\$60			
4300 Misc. Income	\$59,916	\$255,516	\$195,600			
4305 Management Fee	\$4,611		-\$4,611			
4330 Interest Income	\$39,528	\$80,000	\$40,472			
4480 YPB Events/Fundraising	\$2,856		-\$2,856			
4500 Boiler Bldg Rent		\$31,680	\$31,680			
4600 Wine & Food		\$115,000	\$115,000			
4610 Wine & Food Tickets	\$9,569		-\$9,569			
4615 Wine & Food Donations	\$12,077		-\$12,077			
4620 Wine & Food Sponsors	\$82,250		-\$82,250			
<b>Total 4600 Wine &amp; Food</b>	<b>\$103,895</b>	<b>\$115,000</b>	<b>\$11,105</b>			
4700 Golf-Parent acct		\$50,000	\$50,000			
4750 Golf Donations	\$7,959		-\$7,959			
4790 Golf Expenses	-\$5,000		\$5,000			
<b>Total 4700 Golf-Parent acct</b>	<b>\$2,959</b>	<b>\$50,000</b>	<b>\$47,041</b>			
4940 Assoc Board Fundraiser	\$6,488	\$2,500	-\$3,988			
4950 Program Fees	\$24,674	\$30,000	\$5,326			
Markup	-\$613		\$613			
Sales	\$11,632		-\$11,632			
<b>Total Revenue</b>	<b>\$642,568</b>	<b>\$1,287,696</b>	<b>\$645,128</b>			
<b>Cost of Goods Sold</b>						
4690 COS-Wine & Food	\$41,191		-\$41,191			
<b>Total Cost of Goods Sold</b>	<b>\$41,191</b>	<b>\$0</b>	<b>-\$41,191</b>			
<b>Gross Profit</b>	<b>\$601,377</b>	<b>\$1,287,696</b>	<b>\$686,319</b>			

In the 1H FY23-24, Grants offset large budget shortfalls in other primary contribution categories. This may not recur in the 2H which may increase the FY23-24 loss versus budget

Friday, Jan 12, 2024 06:19:54 AM GMT-8 - Accrual Basis



### **Hearth to Home**

- Met with Enterprise, 1/10/24
- Enterprise in progress of selecting next home. Next giveaway: Summer/Fall 2024
- Committee has selected 2 candidates. May hold another selection process based on house location, once selected by Enterprise

### **Strategic Plan Goal #1**

- Performance measures have been built into Insync
- Beginning to track data for performance reports
- Committee will decide on goals based on Allegheny County/HUD national standards

### **PHFA Inspection at HEARTH**

- 3-Year Inspection passed without findings on December 11, 2023
- From PHFA Inspector: "I am thankful to have been able to see your services. Transitional housing that supports families in furthering their education and working, just two services provided, many more services are provided such as the store on site and children's therapy room, access to the community room, the collective effort between staff, residents, and community partners makes this a great place to live. Your passion and expertise in my opinion allows for relevant activities and provisions for residents. By focusing and celebrating resident-based events, the residents have been able to learn about a myriad of things. The residents have access to referral sources and your knowledge of the residence and availability is extraordinary."

### **HEARTH Security System**

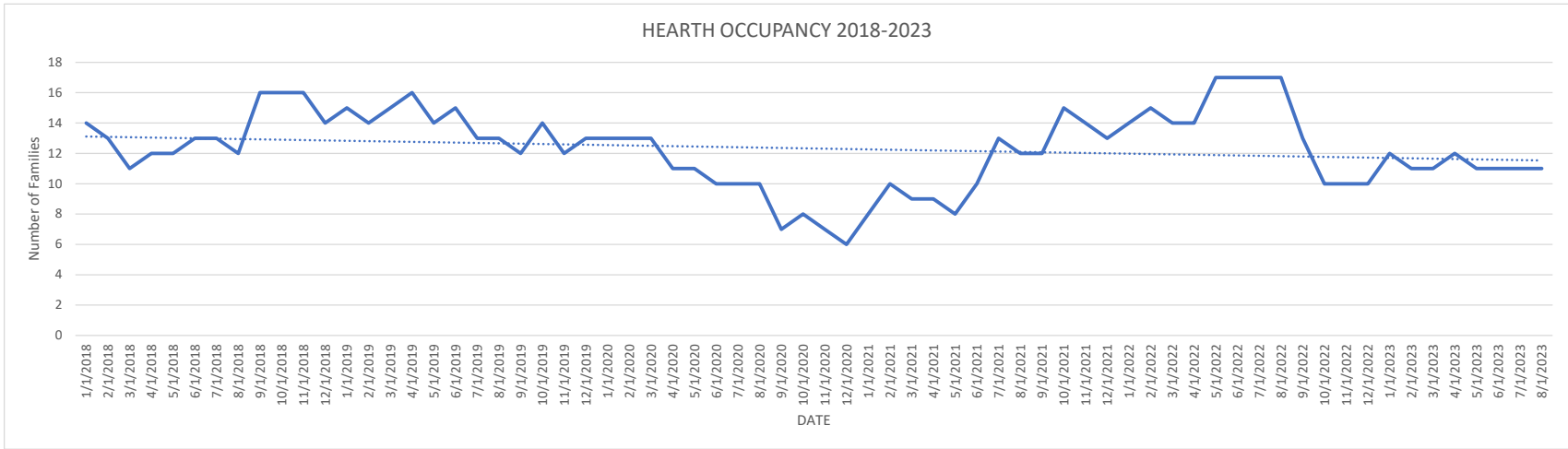
- One of two fob system panels stopped working December 2023 (due to age). Able to create a tentative plan for access and security. New system being installed January 2024 (\$3,000)
- Camera system (19 cameras installed) are being assessed. 3 external cameras will be updated for clearer picture during evening hours

### **Programs at HEARTH**

- Holiday Party in December
- Monthly therapy and parent chat sessions
- 2024 Vision Boards
- Housekeeping/Organization assistance

### **Occupancy at HEARTH**

- 12 of 16 units occupied. Next family moving in 1/15/2024
- Occupancy graph attached (Allegheny County Goal: 85% occupancy rate)





## Governance Committee Report - January 17, 2024

### **Board Expectations and Responsibilities**

- Committee discussing how to track: attendance, donations, ticket sales, involvement
- Need to develop board evaluation criteria (performance against annual goals) and how the board overall meets board goals and board member goals

### **Board Survey**

- Mid-February sent from Kim: board skills, engagement, and involvement

### **Board member recruitment timeline:**

- February-March: Board member posting, review 3-4 current candidates, YPB, enroll in Leadership Pittsburgh's Leadership OnBoard Program
- March Board Meeting - Present board survey findings
- May Board Meeting - Vote on potential board members
- July - Introduce new members at board social and hold board orientation in July at HEARTH

### **HEARTH Board Member Recruitment Priorities:**

1. Diversity (race, gender, class)
2. Nonprofit, social work background
3. Donor base - additional funding opportunities





## HEARTH Board Member Expectations

**Vision: Every family and individual lives in safe, affordable housing.**

**Mission: To provide a range of supportive services and housing that empowers homeless families, who are survivors of domestic violence or other trauma, to become independent, self-sufficient and adequately housed; and to foster low income housing opportunities to prevent homelessness and encourage safe, affordable housing.**

1. Be informed about the agency's programs, policies, and services. Understand the mission and strategic goals of the organization. **Stay informed of your roles and responsibilities as a board member.**
2. Engagement in board meetings as a thought partner, policy maker and planner is required.
  - Attendance is expected for 5 out of 6 board meetings (in person is highly encouraged).
  - Become well informed on all agenda items.
  - Contribute knowledge and express points of view based on experience and professional expertise.
  - Consider other points of view, make constructive suggestions, and help the board make group decisions reflecting the thinking of the total group.
  - Be willing to accept the majority decision even when you are in the minority.
3. As a Board member, you are required to be a part of (at least) one Committee.
  - Attendance is expected at 75% of your committee meetings, as well as any special ad hoc committees to which you are appointed.
  - Actively contribute to achieve your committee goals.
  - Provide updates for Hearth Board meetings and ensure reports are complete and accurate prior to each meeting.
4. Attend the annual Strategic Planning session and scheduled Board Orientation.
  - Understand and align with the goals and strategic vision of Hearth.
  - Executive Committee members will also participate in the annual goal setting session with the CEO
5. Support agency fundraising events.
  - Attend events and represent the board by engaging with attendees.
  - Leverage your network to expand the reach of fundraising events.
  - Increase donations. Examples include but are not limited to attendance at signature events and events held by the Junior Board, drive ticket sales, solicit sponsorships, or silent auction items.
6. Assume leadership roles in agency fund-raising campaigns and events by setting a stretch goal annually and raising a minimum of \$2,500 per year.
7. Represent the agency at community events with organizations and with individuals. Be a community facing advocate for Hearth.
8. Be informed about the needs of the community, society, and constituents. Speak in the community as needed, (with support and guidance from Hearth's Director as needed).
9. Evaluate the organization and CEO's performance on an annual basis against the goals outlined in the strategic plan.
- 10. Evaluate your performance and commit to your board member responsibilities on a yearly basis.**



## Development Committee Report - January 17, 2024

### EOY Annual Appeal

- Exceeded EOY appeal goal of \$95,000. Current total is 104k with the end date being 1/31/24.
- Board total toward 25k is 6k. Encouraging board to continue raising money until end date
- Most successful EOY appeal to date. Last year's total raised: 70k.

### Event Coordinator

- HEARTH selected Hello Productions as new Event Coordinator (reviewed three options)

### HEARTH Events in 2024

- Tees & Traps - Monday, 6/24/2024 @ Longue Vue
- Hats Off to HEARTH - Thursday, September 26th or Thursday, September 12th, Last resort - Thursday, September 19th. Location TBD (Keeping a few dates as options as we search for a new location)
- Purses - Sunday, December 1st @ TBD. Megan and Christy are meeting with LeMont this month to determine if our vision and that space can accommodate. We will be using the mobile auction - a first for an in person Purses event. NOTE: The Dunlap Foundation is now a Trust with the passing of both Anna and Ed Dunlap - therefore reimbursements are no longer a possibility. YPB taking on Purses auction.

### Committee Priorities

- Mother's Day Spring Appeal
- Funding opportunities: CNX, PPG, and Bank of America
- Hats venue location