



HERITAGE HEADLINES

SPECIAL EDITION: OUR YEAR IN REVIEW

Heritage Community Initiatives is the only nonprofit dedicated to three essential elements of socioeconomic mobility: transportation, education, and nutrition

Serving People and Our Economy

I am delighted to share with you an overview of our organization's accomplishments this past year, all of which are grounded in an unwavering commitment to service. Service is the cornerstone of our mission, and it is through service that we make a tangible difference in the lives of tens of thousands of individuals from more than 80 communities in Allegheny County each year.

Heritage has a fundamental obligation to those we serve - and to those who entrust us with their financial investment - to operate an efficient and fiscally sustainable business model that responds to the needs of those whom we are privileged to serve.

None of our work would be possible without two key elements – the generosity of our donors and the dedication of my Heritage teammates.

To our donors – your support has been fundamental to our success and growth for the past 42 years. Please accept our sincere thanks.

To my teammates – it is indeed my honor to work with you, and I am inspired every day by your compassion and commitment.

For those of you considering making a first-time gift at any level to ensure our work can continue, I hope this Year in Review demonstrates why Heritage is a worthy investment.

Whether a long-standing donor or new – your support enables us to expand our reach, enhance our programs, and continue to serve those in need. I ask that you consider an investment in Heritage Community Initiatives.

I look forward to the incredible impact we will achieve together.

Sincerely,

Paula G. McWilliams
President and CEO

Heritage drives more than
\$33.3 MILLION
into our Region's economy each year



Heritage serves individuals from
80+
communities in Allegheny County

Heritage reinvests
\$.94 of every dollar into programs



Heritage has more than doubled in growth in the last
5 YEARS

Heritage has been part of the fabric of Allegheny County for
42 YEARS





Heritage Transportation Services

WHAT WE DO

Heritage Community Transportation (HCT) offers fixed-route public transportation to 16 communities. Our Heritage Transportation Solutions (HTS) creates unique, customized transportation at affordable rates for nonprofits and community-based organizations.

WHO WE SERVE

- 78%** Of our riders do not have access to a vehicle
- 61%** Use our service to access Pittsburgh Regional Transit
- 54%** Have an annual household income of less than \$25,000
- 50%** Use our service to commute to work, shopping, and health care
- 47%** Identify as a race/ethnicity other than White/Non-Hispanic
- 38%** Have experienced food insecurity in the last year
- 17%** are over the age of 55

KEY ACHIEVEMENTS

- ▶ Restored full service and introduced enhanced amenities to HCT
- ▶ Provided 576 Courtesy Cards to 3 nonprofit partners - each card representing 3 months of free rides
- ▶ Maintained our \$.25 fare
- ▶ Re-launched and rebranded HTS, securing 5 contracts in 4 months since re-launch



I think Heritage's transportation (HCT) is wonderful for so many reasons. You provide safe, dependable, much needed service to communities that really need transportation they can afford.

HCT Rider from Monroeville



SHIM cannot thank Heritage Transportation Services enough for stepping up to assist us with our summer transportation. Without you, our summer camp field trip experience was going to be significantly curtailed. You've brightened the summer for a great number of kids!

Jim Guffey, Executive Director - SHIM



For Their Unwavering Support,
We Salute
The Ann and Frank Cahouet
Foundation
and
Richard King Mellon
Foundation

Heritage Education Programs

WHAT WE DO

Heritage offers two high-caliber education programs - Heritage 4 Kids Early Learning Center and HOST (Heritage Out of School Time). Our licensed and nationally recognized programs serve infants (6 weeks) to 5 years of age (4 Kids) and kindergarten through 5th grade (HOST).

WHO WE SERVE

- 52%** of households report an income of less than \$35,000 annually.
- 78%** of Heritage education program students live in female headed households
- 76%** of head of households are Black or African American
- 92%** or more of Heritage education programs' guardians work at least one job.
- 90%** of families enrolled in Heritage education programs qualify for subsidized child care (see below)

KEY ACHIEVEMENTS

- ▶ More than 300 students were enrolled in our 4 Kids Early Learning Center and HOST in FY'25
- ▶ Awarded \$86,700 in scholarship dollars to students
- ▶ Maintained our offering of Early Head Start, Head Start and Pre-K Counts
- ▶ Conducted more than 1,571 student assessments to inform custom classroom curriculum based on individual student goals and needs
- ▶ 85% of our educators meet or exceed credential expectations for early learning and out of school time

CCW - CHILD CARE WORKS:

A subsidized childcare program - funded by the state and federal government - to help families pay their childcare fees. For families to meet the guidelines, parents must work a minimum of 20 hours per week OR work 10 hours per week and go to school or train for 10 hours a week.



Heritage 4 Kids Learning Center as well as the Heritage HOST Program has impacted my family in so many positive ways. They have had all our children since 2016. They loved them unconditionally, spoke life into them, & most of all, taught them very well & they are still excelling in school currently.

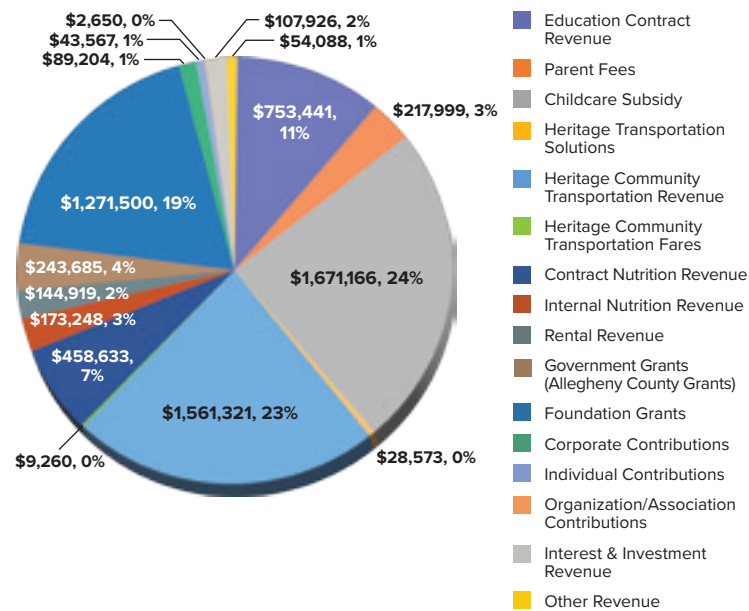
Education Family Mom



Heritage Community Initiatives: FY'25 Financials

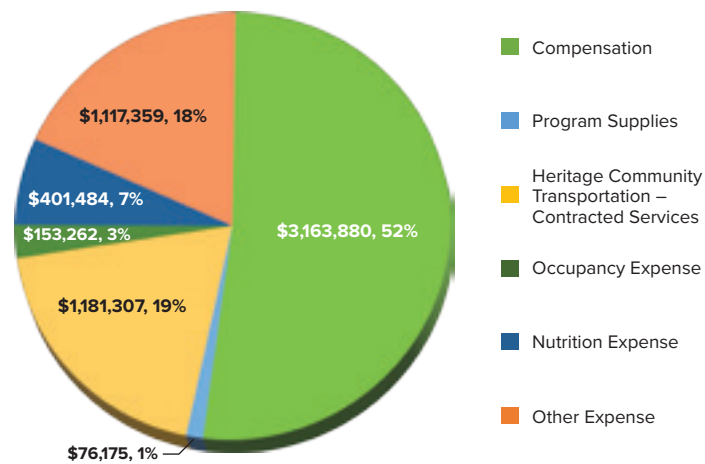
Our fiscal year runs from July 1 through June 30th;
the following are unaudited financials

Fiscal Year '25 Revenue



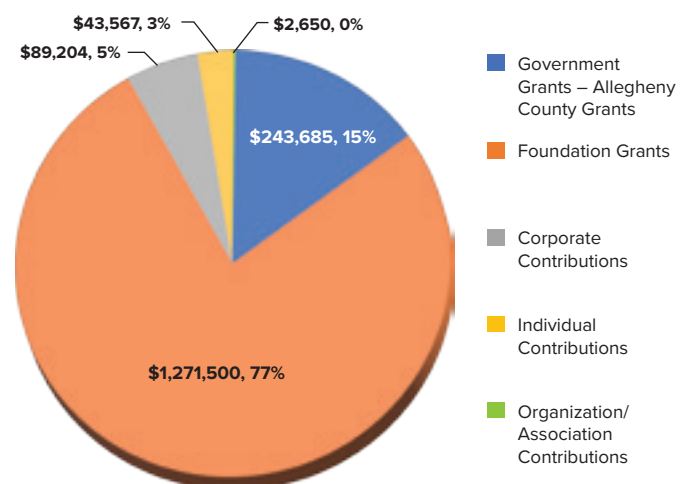
- Education Contracts include PKC (Pre-K Counts), Head Start and Early Head Start
- Heritage Community Transportation is a combination of PennDOT and Local Match Funds (15%) by Allegheny County
- Childcare subsidy is a combination of funds from CCW (Child Care Works), Child, Youth and Families (CYF), and Allegheny County Childcare Matters (ACCM)

Fiscal Year '25 Expenses



- Compensation includes salaries, benefits, and employer taxes
- Other expenses include, but are not limited to professional development, educational enrichment, audit expenses, and recruitment

Development Revenue



- Heritage Community Initiatives raised \$1.67M – a 61% increase from FY'24
- 44% of our donors in FY'25 contributed for the first time

We Are Grateful to Our Donors

- | | |
|---|---|
| A.J. & Sigismunda Palumbo Charitable Trust | Kim Milos |
| Richard Abels | Kristy Mitchell |
| APOST Inc | Mon Valley Clean Air Fund |
| Molly Allwein | Ezz-Eldin Moukamal, MD |
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| Hillman Foundation | Vaughn Ziemianski |
| Dr. Elmer & Ethelreda Holzinger | In Honor of Stan & Jill Herman |
| Michael Hutchinson | Brandon Schwan |
| Isadore & Yetta Josophowitz Charitable Foundation | In Honor of David Massaro & Family |
| JB Finley Charitable Trust | David Bush |
| Jack Buncher Foundation | In Honor of Paula G. McWilliams |
| Jefferson Regional Foundation | Shirley & Bill Freyer |
| Michael Kauffelt | In Honor of John Stockhausen |
| Laura Kelley | Barbara Giglotti |
| Mary Carol & Tim Kennedy | Stephen V. & Margaret Breen Snavely |
| Joseph Knapton | In Memory of Susan Herron Kozusko |
| Barbara Kudis | Susan Brown |
| Dr. Louis & Susan Leff | In Memory of Mon Valley Immigrant Steelworkers |
| Michael Liss | Leslie & Paul Bodnarchuk |
| Heather Lum | In Memory of Paul & Germaine McWilliams |
| Maher Duessel | Shirley & Bill Freyer |
| David & Luci Massaro | Paula G. McWilliams |
| Massey Charitable Trust | In Memory of Richard & Patricia Ziemianski |
| Shany Matheys | Richard Ziemianski |
| John McCarty | |
| Christopher McElroy | |
| Lianne McGrady | |
| McKeesport Hospital Foundation | |
| Michael McLean | |
| Polly McQueen | |
| John McWilliams | |
| Paula McWilliams | |
| Amy Miller | |
- * Given in their honor by Paula G. McWilliams

At Heritage Community Initiatives Our Teammates Are Our Greatest Asset

- 24% of Heritage teammates have been with the organization for more than a decade
- Our organization invested more than \$195,400 in our Employee Child Education Benefit
- Heritage covers on average 70% of premiums for employees that take our health insurance and 100% of vision, short-term and long-term disability coverage and basic life insurance for full-time teammates



Heritage Community Initiatives Salutes Our Collaborative Partners

- Animal Friends
- Auberle
- Carlow University
- Carnegie One Braddock (formerly Braddock Public Library)
- Catholic Charities
- Greater Pittsburgh Community Food Bank
- Grow Pittsburgh
- HARP (Humane Animal Rescue of Pittsburgh)
- PA CareerLink
- Pittsburgh Zoo and Aquarium
- Point Park University
- Reading Ready Pittsburgh
- Trying Together
- WIC

Heritage Nutrition Services

WHAT WE DO

Our team designs, prepares, and delivers nutritious and delicious meals – 65% of which are made from scratch – not only to our students but to organizations that serve at-risk children and seniors. Our rigorous compliance and quality standards adhere to the guidelines set by the United States Department of Agriculture, Pennsylvania Department of Education, the Child and Adult Care Food Program (CACFP) and Summer Food Service Program (SFSP).



Heartfelt Thanks to The Eden Hall Foundation and The Hillman Foundation

For their investment that will allow us to begin expanding our current kitchen to meet the exponential growth in demand to nourish at-risk children as well as help combat food insecurity in our Region

WHO WE SERVE

80% of Heritage students are eligible for free/reduced meals

100% of students served through our external contracts are eligible for free/reduced meals

“
Heritage Nutrition Services' approach to nourishing our community has significantly enriched lives from children to our seniors. Their delicious meals and dedication are a cornerstone of our commitment to community health, creating lasting positive impacts by nourishing bodies and fostering communities across all ages.

**Darlene McGregor, Executive Director,
Rankin Christian**

KEY ACHIEVEMENTS

- ▶ Prepared more than 244,000 meals – an increase of 12% over FY'24 due to the growth of our external customers
- ▶ Doubled the number of external contracts, expanding the number of sites served from 12 to 26
- ▶ Our Summer program alone grew by 124%, serving 2,790 meals per day

Our Thanks to Jim Shorkey Auto Group for donating the use of a van, allowing us to deliver nearly 2,000 meals a day to hungry children this summer



IF YOU BELIEVE...

Exceptional early learning and out of school time should be attainable for all children regardless of their zip code...

Affordable transportation should be accessible for individuals, allowing them to work and obtain health care...

Healthy, scratch-made meals should be available for children who need them...

...then please help Heritage Community Initiatives by giving at heritageserves.org/donate-now



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Heritage Community Initiatives

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