

Partner4Work
Executive Committee
8:00 to 9:30 a.m. September 12, 2025
Via Zoom:

<https://us02web.zoom.us/j/89815891077?pwd=W1unF4tqTSLgc9lQXZfka2A7VziEXL.1>

1. **Welcome and roll call**

David Malone, Chair

2. **General Business – Consent Agenda**

ACTION:

- **Approve** the minutes of the June 27, 2025 Partner4Work board meeting and the June 13, 2025 Executive Committee meeting.
- **Accept** all funds since the last Executive Committee meeting
 - CDBG year 50 - \$450,000 for Learn and Earn 2025
 - CDBG year 51 - \$450,000 for Learn and Earn 2026
 - PA CareerLink® Awareness Funding - \$40,000 for awareness events
 - Taco Bell Foundation - \$48,000 for Learn and Earn
 - University of Pittsburgh - \$13,000
 - Homeless Children’s Education Fund - \$29,937.60
- **Approve** updates to policies:
 - Employee Handbook
 - Gift Acceptance Policy
- **Approve** contracts
 - EARN/SNAP
 - Goodwill of Southwest PA: \$100,000 EARN/SNAP
 - \$100,000 amendment results in \$170,764 total value*
 - Healthcare Apprenticeship
 - UPMC Presbyterian Shadyside: \$372,000 Healthcare RAP

Informational Only – *Contract Activity presented for informational purposes only per Partner4Work’s procurement policy; no board action required.*

▪ Green Building Alliance:	\$25,000	BPI
▪ PGH Chapter Nat’l Tooling & Machining Fdtn:	\$6,790	ABA
▪ University of Pittsburgh Physicians:	\$40,000	PASmart/Healthcare
ABA		
▪ Phase 4 Learning Center:	\$90,356.07	School2Work
▪ Boys & Girls Clubs of W. PA:	\$90,356.07	School2Work
▪ DePaul School:	\$50,000	PASmart/Healthcare
ABA		
▪ Operation Better Block:	\$55,000	YARP
▪ PASSHE Foundation:	\$25,000	IP Financial
▪ Dynamic Workforce Solutions:	\$32,214.76	Opioid
▪ Near Earth Autonomy, Inc.	\$12,300	BBB
▪ Global Wordsmiths LLC	\$25,000	EARN/WR

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The Workforce Development Board for the Pittsburgh Area

▪ Goodwill of Southwestern PA	\$150,000	DCW UPMC
▪ Q&A Consulting and Training	\$20,000	ARC/Inspire
▪ Coop & Hall Construction	\$30,000	Clean Energy

3. Committee Reports

- **Audit and Finance** *Steve Massaro, Treasurer, and Kristin Kramer, CFO*
- **Governance and Learn & Earn** *Debra Caplan, Chair*
- **Program Optimization Committee** *Cat McLaughlin, Chair*

4. CEO's report

- Federal and State landscape *Robert Cherry, CEO*

5. Other Business

6. Open Forum and Public Comment

Speakers are limited to three (3) minutes

7. Closed for Executive Session

8. Adjournment



Minutes of Partner4Work Board of Directors' Meeting

8:30 a.m. June 27, 2025

Zoom and Centre City Tower, 650 Smithfield Street

Board Members Present

Dave Malone, chair
Barāta Bey
Jmar Bey
Dr. Quintin Bullock
Debra Caplan
Dave Coplan
Erin Dalton
Clarence Dozier
Carey Harris
Tim Holt
Crystal Houser
Terry Huey
Ike Gittlen
Gabriella Gonzalez
Dan Lavalley
Steven Massaro
Steve Mazza
Cat McLaughlin
Nadyli Nuñez
Mark Rendulic
Alexis Russell
Joshua Stewart
John Thomas
Marisol Valentin
Nancy Washington

Board Members Absent

Will Allen
Rich Barcaskey
Rich Casoli
Brian Gaudio
Laura Ellsworth
Darrin Kelly
Katherine McEvilly
Jeff Nobers
Sam Williamson

Guests Present

Rose Alexander-Staples (PA CareerLink®)
Yurron Arrington (Learn & Earn presenter)
Amy Blystone (PA CareerLink®)
Jeff Dick (L&I)
Christine Grigsby (Equus)
Melissa Handlovich (PA CareerLink®)
Denise Jones (Youth Enrichment Serv.)
Arnisha Keyes (PA CareerLink®)
Chester Lampman (L&I)
Alexis McCartney (PA CareerLink®)
Paula Mendoza (Learn & Earn presenter)
Leo Morrow (PA CareerLink®)
Joshua Stewart (Phase 4 Learning Center)
Chris Upchurch (PA CareerLink®)
TaMaya Wells (Learn & Earn presenter)

Staff Present

Rob Cherry, CEO
Kristin Kramer
Brian Kreit
Markese Long
Susie Puskar
Dave Tinker
Dr. Carl Wesley
LaDonna Woods

Board Meeting Minutes

Zoom and Centre City Tower, 650 Smithfield Street

Chair Malone called the meeting to order at 8:32 a.m. and announced a quorum present. A link to the agenda was posted on the Partner4Work website.

- Staff, board members, and guests joining remotely were asked to acknowledge their participation in the chat feature.

CONSENT AGENDA

No one wished to discuss any item in more detail for separate treatment.

ACTION:

- **Approve** the minutes of the March 28, 2025 Partner4Work board meeting and the March 12, 2025 Executive Committee meeting.
- **Accept** all funds since the last Executive Committee meeting
 - \$500,000, RK Mellon Foundation
 - \$400,000, Supporting Healthcare Sector through Apprenticeships
 - \$400,000, Supporting IT Sector through Apprenticeships
 - \$250,000, Schools to Work
 - \$35,000, Chicago Women in the Trades
 - \$125,000, JP Morgan Chase Foundation
 - \$75,000, The Pittsburgh Foundation
 - \$65,000, The Heinz Endowments
 - \$53,000, Citizen’s Bank
 - \$25,000, The Buhl Foundation
 - \$609,571, SNAP Jets
 - \$42,500, ARC ARISE
- **Approve** updates to policies
 - WIOA Adult & Dislocated Worker Policy Guide
 - WIOA Youth Policy Guide
 - TANF YDP Policy Guide
- **Approve** contracts
 - **WIOA**

▪ Dynamic Workforce Solutions	\$2,200,000	Adult/DW
▪ Jewish Family & Community Services	\$120,000	Adult/DW
▪ Goodwill of Southwestern Pennsylvania	\$350,000	Adult
▪ Auberle	\$600,000	Youth
▪ Goodwill of Southwestern Pennsylvania	\$276,000	Youth
▪ Phase 4 Learning Center	\$1,650,000	Youth
▪ Pittsburgh Public Schools	\$184,000	Youth
▪ Trade Institute of Pittsburgh	\$200,000	Youth
 - **TANF**

▪ Auberle	\$122,498	Youth
▪ Bloomfield-Garfield Corp	\$171,000	Youth
▪ Boys & Girls Club of Western PA	\$150,000	Youth
▪ Community Empowerment Assn	\$80,000	Youth
▪ Crossroads Foundation	\$120,256.41	Youth
▪ Goodwill of Southwestern Pennsylvania	\$129,035	Youth
▪ Human Services Center Mon Valley	\$518,000	Youth
▪ Jewish Family & Community Services	\$100,000	Youth
▪ Latino Community Center	\$80,000	Youth
▪ Neighborhood Learning Alliance	\$192,000	Youth

	▪ Youth Enrichment Services	\$300,000	Youth
	▪ City Charter High School	\$38,000	Youth
○	Industry Recognized Training Programs (IRTP)		
	▪ APRI	\$140,000	
	▪ Boys & Girls Club	\$100,864.05	
	▪ Community Kitchen of Pittsburgh	\$75,000	
	▪ FortyX80	\$40,000	
	▪ German American Chamber of Commerce	\$60,000	
	▪ New Century Careers	\$105,000	
	▪ Per Scholas	\$80,000	
	▪ Phase 4	\$38,174	
	▪ PGH Gateways	\$245,000	
	▪ Trade Institute of Pittsburgh	\$105,000	
	▪ UPMC Freedom House	\$265,840	
○	PACL RSA		
	▪ Arbor E & T, LLC dba Equus Workforce Solutions	up to \$511,500	RSA
○	Other		
	▪ Hear Foundation	\$115,000	
	▪ Phase 4 Learning Center (School to Work)	up to \$120,000	
	▪ Correlation One (Supporting IT Sector thru RAPs)	\$294,250	
	▪ UPMC - EVS RAP	\$30,000	
	▪ UPMC – Dietary Tech RAP	\$30,000	
	▪ UPMC - Ophthalmic RAP	\$40,000	
	▪ Energy Innovation Center Institute	\$290,000	
	▪ Dynamic Workforce Solutions (CNI)	\$72,000	
	▪ German American Chamber of Commerce	\$300,000	

The consent agenda was approved on a motion by Debra Caplan, seconded by Dr. Quintin Bullock. Debra Caplan, Dan LaValle, and Tim Holt abstained from the UPMC contract vote; Debra Caplan, Laura Ellsworth, Dr. Quintin Bullock, Dave Malone, and Erin Dalton abstained from the HEAR Foundation contract vote; Dr. Quintin Bullock abstained from the Buhl Foundation contract vote; and Dave Coplan abstained from the Human Services Center contract vote. There were no objections.

GENERAL BUSINESS

- WIOA Local and Regional Plans

On a motion by Tim Holt, seconded by Dr. Quintin Bullock, the PY2025 - PY2028 Local WIOA Plan for the Allegheny County and City of Pittsburgh Workforce Development Areas and the Regional WIOA Plan for Southwest Pennsylvania were approved without objection or abstention.

Audit and Finance Report

Kristin Kramer, CFO, walked through the 2025-2026 draft Partner4Work budget and outlined key financial shifts. There is an overall \$1 million decrease in projected income, driven largely by a drop in WIOA funding—most significantly in youth programs, which saw a \$720,000 decline. Despite this, no youth programs were eliminated; instead, funding was scaled back by approximately 10% as part of a broader effort to right-size allocations. TANF adult funding increased with the incorporation of PA CareerLink® centers, while the sunset of the Pathways Home and Ex-Offender grants contributed to a \$400,000 drop in the priority populations line. Personnel costs decreased by \$163,000 despite a 4% staff COLA and raise, due to a consolidation of staff

positions. Contracted services rose by \$446,000 to support in-house Learn & Earn payroll operations, temporary hires, and a new payroll system. Overall, direct program expenses experienced the most significant reductions, while strategic investments continued in areas like sector strategies and a refreshed organizational plan.

On a motion by Tim Holt, seconded by Carey Harris, the FY 2025-2026 annual Partner4Work budget was approved as presented without objection or abstention.

CEO Report

Rob Cherry redirected his CEO report to focus on urgent federal legislative developments that could significantly affect workforce funding and operations. He outlined looming changes like the potential shift of Perkins funds to high schools (away from post-secondary institutions), proposed cuts to Pell Grants, and the risk of funding consolidation through block grants. He emphasized the impact of these changes on local institutions and services, warning that funding reductions could come even as more people are pushed into the system due to new work requirements for Medicaid and SNAP.

Susie Puskar provided context on the federal budget process, reconciliation procedures, and details of H.R.1, including tax changes, workforce policy shifts, and controversial restructuring proposals. She also covered the Trump administration's budget plan, which proposes deep cuts to the Departments of Labor and Education and eliminates key workforce programs. Cherry concluded by highlighting Partner4Work's proactive steps—such as contingency planning for Job Corps closures, launching new funding proposals, and advocating in DC—to stay ahead of these changes.

Program Optimization Committee Report

Cat McLaughlin reported that the committee has reviewed and approved a slate of contract renewals and funding recommendations across multiple workforce programs, including WIOA Adult, Dislocated Worker, Youth, TANF Youth, and industry training initiatives, most of which align with the WIOA 4-Year Cycle. The team is closely monitoring a projected 30% reduction in WIOA allocations for Program Year 2025, with the most significant impact anticipated in 2026 if further cuts occur; mitigation strategies are already in development. The co-location of EARN and Work Ready programs at PA CareerLink® is proceeding as scheduled for July 1, alongside a re-envisioning of the PA CareerLink® Operator role to enhance system coordination and user experience. Additionally, the newly launched Cybersecure Pittsburgh initiative aims to serve 60 youth by 2027 through a pre-apprenticeship tech pipeline supported by several community partners. Lastly, efforts continue to identify and address geographic service gaps, especially in Pittsburgh neighborhoods and select county regions, to ensure equitable access.

Learn & Earn Committee Report

Debra Caplan announced the launch of the 2025 Learn & Earn summer program with a new three-tiered structure which surpassed its placement goal by enrolling 940 youth across Allegheny County and Pittsburgh. Partner4Work now serves as the employer of record, streamlining payroll operations and easing administrative burdens for providers. Program priorities this year include youth retention, high-quality worksite standards, timely payroll, and real-time provider support. Youth participants shared powerful testimonials about how the program helped them build confidence, develop professional skills, and access meaningful career experiences—such as internships with the Pittsburgh Penguins. However, they also emphasized the need for broader outreach to high schools and college campuses to ensure more students are aware of the opportunity. Longtime program partners, such as Phase 4 Learning Center and Youth Enrichment Services, praised the program's impact and expressed interest in expanding service capacity to reach more youth. Board members were encouraged to attend upcoming end-of-summer events and continue fostering connections that help scale the program's reach and outcomes.

Open Forum and Public Comment

During the open forum portion of the board meeting, concerns were raised about the severe financial strain facing higher education institutions and the need to align college training programs with employer needs, particularly by having employers support job-relevant training. Additionally, the broader economic risks tied to federal policy changes, including potential cuts to afterschool programs, transit funding, Medicaid, and social services could severely impact low-income families and local economies.

There was no public comment.

The meeting adjourned at 9:52 am on a motion from Dave Malone.

Executive Committee Minutes from June 13, 2025

Attending: Joe Belechak, Debra Caplan, Laura Ellsworth, Darrin Kelly, Cat McLaughlin, Steve Massaro

Absent: Erin Dalton, Dave Malone

Staff Present: Rob Cherry, Susie Puskar, Carl Wesley, Brian Kreit, Dave Tinker, Kristin Kramer, LaDonna Woods

Others Present: none

The meeting was called to order at 8:01 a.m. with a quorum present.

Consent Agenda

Consent agenda items included approval of minutes, accepting grants, and awarded contracts. **On a motion by Laura Ellsworth, the agenda was approved as presented. Debra Caplan abstained from UPMC and HEAR Foundation contract approval. Laura Ellsworth abstained from HEAR Foundation contract approval. There were no objections.**

Audit and Finance Updates

Kristin Kramer provided the finance report by reviewing the budget and dashboard report. Partner4Work holds \$8.74 million in cash and a timing-driven, year-to-date operating deficit of \$2.6 million that should close as Learn & Earn reimbursements are received. The balanced FY 25-26 budget of \$29.9 million, about 3 percent below the current year, reflects a \$980K decline in WIOA formula funds, offset partly by higher Adult/TANF allocations, while savings from lower WIOA Youth, Dislocated Worker and Priority Populations spending are redirected to strategic contracts and internships. Streamlining Partner4Work staffing positions has left more resources for direct program delivery. The audit and finance committee have been working to develop contingency plans for a potential decrease in federal funding and are prepared for such instances. **On a motion by Debra Caplan, seconded by Cat McLaughlin, the budget will advance to the full board for approval.**

Learn & Earn & Updates

Debra Caplan reports that the 2025 Learn & Earn summer program is on track. Tier III youth begin June 16, with Tiers I & II starting June 23. The initiative has already placed 932 of its 900-plus target participants and expects additional placements pending the receipt of any outstanding funding requests. Of 2,901 applications to date, 1,393 youth (814 city, 579 county) are confirmed eligible; 396 are under review, 1,108 are incomplete, and 51 were ineligible—showing strong demand across Allegheny County and Pittsburgh. Partner4Work has become the employer of record, hiring payroll staff and onboarding youth in ADP to guarantee prompt pay. Orientation is underway, and summer priorities include boosting youth retention through a new three-tier model, ensuring high-quality worksites, delivering on-time payroll, and providing real-time support to community providers. Learn & Earn participants will share their experiences at the upcoming full board meeting.

Program Optimization Updates

Cat McLaughlin provided updates from the Program Optimization Committee. (POC). Since the last meeting, the POC has approved contract renewals and funding recommendations across Adult, Dislocated Worker, Youth, TANF Youth Development, and industry training programs, advancing most through the board's consent agenda; meanwhile it is modeling mitigation strategies in response to a projected 30% cut to WIOA allocations for PY 25 that could impact PY 26. EARN and Work Ready programs will be co-located at PA CareerLink® sites by July 1, and the committee has begun redesigning the Operator role to enhance system coordination and customer experience. On the innovation front, CyberSecure Pittsburgh, a schools-to-work pre-apprenticeship initiative, will build a tech pipeline for 60 youth by 2027 in partnership with Urban Pathways, Phase 4, and Boys & Girls Club. Equity efforts stay focused on closing geographic service gaps in the Northside, Hilltop, Carrick HS, and the county's Clairton and Moon areas.

CEO Report

Rob Cherry provided the CEO report. Partner4Work secured a \$500K, 18-month Regional Advanced Manufacturing Partnership (RAMP) planning grant to grow the advanced-manufacturing workforce in partnership with employers in the area, creating a flexible model that can be retuned for future industry reinvestment.

The U.S. Department of Labor's decision to pause operations at Job Corps puts 394 currently enrolled young people at risk. About half (188) of Job Corps participants reside on-site; about 50 of these individuals lack stable housing. 165 staff may be affected. P4W, CCAC, DHS and other partners are working together to respond swiftly, pending a court hearing next week. PA CareerLink® is working to keep services flowing and to coordinate with other Job Corps centers on participants who might return to Allegheny County.

Looking ahead, federal budget debates could shrink WIOA resources if a "Making America Skilled Again" block-grant replaces them. Potential provisions on SNAP, work-study, and Medicaid may add caseload pressure and administrative hurdles. P4W is proactively meeting with legislators in DC and local partners to advocate for policy changes. A state-level block grant could offer more flexibility than the current system allows. It was suggested that P4W Leadership craft talking points so board members can speak with one voice in upcoming advocacy conversations.

Operationally, the capacity to serve clients at PA CareerLink® is stronger after integrating TANF and EARN clients.

There will be a special Executive Session scheduled later to discuss confidential questions.

There was no public comment.

The meeting adjourned at 8:57 a.m.

DRAFT GIFT ACCEPTANCE POLICY

Purpose

Partner4Work seeks and accepts donations throughout the year to support our mission and programs. This Gift Acceptance Policy is designed to help board and staff members in the process of accepting appropriate gifts that will benefit the organization and its programs.

Background

A Gift Acceptance Policy is a common policy for nonprofit organizations who accept donations. It serves as a framework to guide the organization in determining which gifts to accept or decline, ensuring alignment with its mission, values, and operational capacity. It will also assist board and staff members in avoiding gifts that go against commonwealth or federal law.

Scope / Affected Parties

This policy covers all donations to our organization. Partner4Work does not provide legal or tax advice to donors. Donors are encouraged to consult with their own legal and tax advisors regarding the tax-deductibility of donations.

Definitions of Key Terms

- ACH/EFT - Automated Clearing House / Electronic Funds Transfer.
 - ACH is one type of EFT. ACH is a way to directly deposit funds into a bank account, e.g., direct deposit.
 - EFT is the umbrella term for moving money electronically.
- Donor Advised Funds (DAFs) - is like a charitable investment account. Donors put money (or other assets, like stock) into the account, receive an immediate tax deduction, and then recommend grants to charities from the fund over time.
- In-kind gift – a donation that is not a gift of cash.
- Planned Gifts – Also known as legacy gifts, are donations that supporters arrange now but that typically benefit the organization in the future—often as part of their estate planning. Charitable bequests and naming charities as a beneficiary of a life insurance policy are the most common planned gifts. It can also encompass more sophisticated financial vehicles.
- QCD – Qualified Charitable Distribution – is a way for people who are age 70½ or older to donate money directly from their Individual Retirement Account (IRA) to a qualified charity.

Policy / Procedure

Types of Gifts Partner4Work Accepts – Cash, Checks, Stocks, ACH/EFT, In-kind gifts, Planned or Legacy Gifts, Gifts from Donor Advised Funds, Gifts from Qualified Charitable Distributions, and Real Property. This list is not meant to be exhaustive but rather lists common types of donations.

Types of Gifts Partner4Work Does Not Accept –

- Gifts from illegal activities, including those that may be legal in Pennsylvania but not at the federal level, e.g., gifts from medical marijuana-related companies, will not be accepted.
- Partner4Work does not have a cryptocurrency account; therefore, Partner4Work cannot accept a cryptocurrency donation.
- Additionally, in-kind gifts and gifts of real property that would not benefit the organization or its programs will not be accepted.
- Gifts that may cause a conflict of interest for staff or for Partner4Work will not be accepted.
- Also, gifts with restrictions that are too burdensome for Partner4Work to comply with or those that could put Partner4Work's 501(c)(3) designation in jeopardy will not be accepted.
- This list is also not meant to be exhaustive but rather lists common types of donations.

Cash and Checks, ACH/EFT, Donor Advised Funds (DAFs), and Qualified Charitable Distributions (QCDs) – Gifts of cash, including cash and checks, ACH/EFT, DAFs, and QCDs, will be accepted and deposited into Partner4Work's bank account. Unless otherwise indicated by the donor, gifts of cash will be used to support general operating expenses. Fund Development staff must work with the CFO for proper recording of the gifts.

Stocks – Unless otherwise directed by the Partner4Work board, all gifts of stock will be sold once Partner4Work takes possession of the stock. The funds from the sale of the stock will be used for general operating unless otherwise indicated by the donor.

Planned Gifts aka Legacy Gifts - Gifts of cash from a planned gift will be accepted and deposited into Partner4Work's bank account. Unless otherwise indicated by the donor, gifts of cash will be used to support general operating expenses. Non-cash gifts from a planned gift will be accepted in accordance with the paragraphs in this policy related to the type of gift.

In-kind gifts – In-kind gifts will be accepted by Partner4Work only if the item or service being donated may be used by the organization and or the program partners, e.g., donation of new hand tools for construction programs.

Partner4Work may not set the value of in-kind gifts. Any in-kind gift must be valued by the donor. If

the in-kind gift value is more than \$5,000 then the donor is responsible for getting an independent appraisal for the item(s) and complete IRS Form 8283. It is highly recommended that the donor have conversations with their own tax-advisor to maximize the benefit they may receive from donations of in-kind gifts.

Real Property - On rare occasions Partner4Work may accept gifts of real estate—including residential, commercial, or undeveloped property—when such gifts support the mission and purposes of the organization and can be readily converted into liquid assets. All gifts of real property are subject to a thorough review to ensure that they do not expose the organization to undue risk, expense, or liability.

Required Conditions for Acceptance of Real Property

1. Ownership & Title

Donor must provide clear and marketable title, free of liens, mortgages, or other encumbrances. Title insurance will be obtained at the time of transfer.

2. Environmental Review

Prior to acceptance, the organization will obtain an environmental assessment (Phase I Environmental Site Assessment, and Phase II if warranted) to ensure the property has no environmental contamination or hazardous waste issues. Any required environmental testing will be at the donor's expense unless otherwise approved.

3. Appraisal

In accordance with IRS requirements for charitable contributions of property valued over \$5,000, the donor must obtain, at their expense, a qualified independent appraisal of the property's fair market value (IRS Form 8283).

4. Carrying Costs

The donor must disclose any ongoing expenses related to the property (property taxes, insurance, association dues, utilities, maintenance, etc.). The organization must agree in writing to assume any such obligations before acceptance.

Review & Approval Process

- All prospective gifts of real property will be evaluated by the staff Leadership Team with the assistance of legal counsel, real estate professionals, and other advisors as needed.
- A formal recommendation will be made to the Board of Directors for final approval.
- Acceptance is contingent upon a written Gift Agreement outlining the terms of transfer, responsibilities, and expectations.

Liquidation of Property

- Unless otherwise determined by the Board, all real estate gifts will be sold as soon as practicable after transfer. The net proceeds from the sale will be used in accordance with

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the donor's stated gift purpose, or, if unrestricted, in support of the organization's mission.

Special Restrictions

Partner4Work reserves the right to decline any gift of real property if:

- It is determined that ownership could create financial, legal, or environmental liabilities;
- The property cannot be sold in a reasonable timeframe;
- The intended use is inconsistent with the organization's mission or strategic goals.

Naming Opportunities - Partner4Work may offer naming opportunities to recognize transformational support from donors or to honor individuals whose values and legacy are aligned with the organization's mission and vision. Such naming opportunities shall be governed by clearly defined gift thresholds, approval protocols, and legal agreements. These ensure that both Partner4Work and the donor know the expectations related to the gift.

- **Minimum Gift Levels:** Naming opportunities are contingent upon a minimum gift amount deemed sufficient to support the named program, facility, or initiative in a meaningful and sustainable way.
 - If Partner4Work undertakes a fundraising campaign with any naming opportunities, the gift amounts will be listed with benefits and donation levels.
 - If the donor asks for a naming opportunity as part of the benefit of a gift, Partner4Work will consider the opportunity.
- **Approval Process:** All naming prospects shall receive final approval from both Partner4Work's CEO and the Executive Committee of the Partner4Work Board of Directors. Any naming recommendation must be approved in writing and documented in a formal Gift Agreement prior to public solicitation or announcement.
- **Alignment with Mission and Values:** Names selected for recognition should reflect and uphold the values and vision of Partner4Work, preserving institutional reputation and public trust.

Terms & Agreements for a Naming Gift – Any Naming Rights Agreement or MOU will include:

1. Duration of Naming Rights

Naming agreements should specify the period during which the name will remain associated with the gift (e.g., in perpetuity or for a fixed term).

2. Form of Recognition

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The Gift Agreement should outline how and where donor names are displayed, including size, materials, and wording of plaques or signage, as well as textual recognition in program materials or digital platforms.

3. **Morals Clause / Revocation Provisions**

To protect the organization’s reputation, the agreement must include a morals clause or revocation rights. This clause empowers Partner4Work to remove or modify naming recognition if the donor’s conduct—criminal, reputational, or otherwise—could harm organizational credibility or stakeholder trust.

Gift Acknowledgements – It is an industry best practice to acknowledge gifts that come into our possession within 3-5 business days or sooner. Parnter4Work will respond to all gifts in that timeframe with an initial tax receipt for the donor’s records. Additional thank you letters or communications may be undertaken at a later time.

Return of Philanthropic Gifts – While Partner4Work deeply values philanthropic support, the organization reserves the right to return or redirect any gift if it is determined that the donor's actions—past or present—are illegal, unethical, or fundamentally inconsistent with our mission and values. Such a decision may be made to preserve public trust, uphold ethical integrity, and protect the reputation and credibility of the organization.

Final Note - This Gift Acceptance Policy may be amended when needed. Any amendments will be reviewed and approved by the Partner4Work board of directors.

Effective Date:

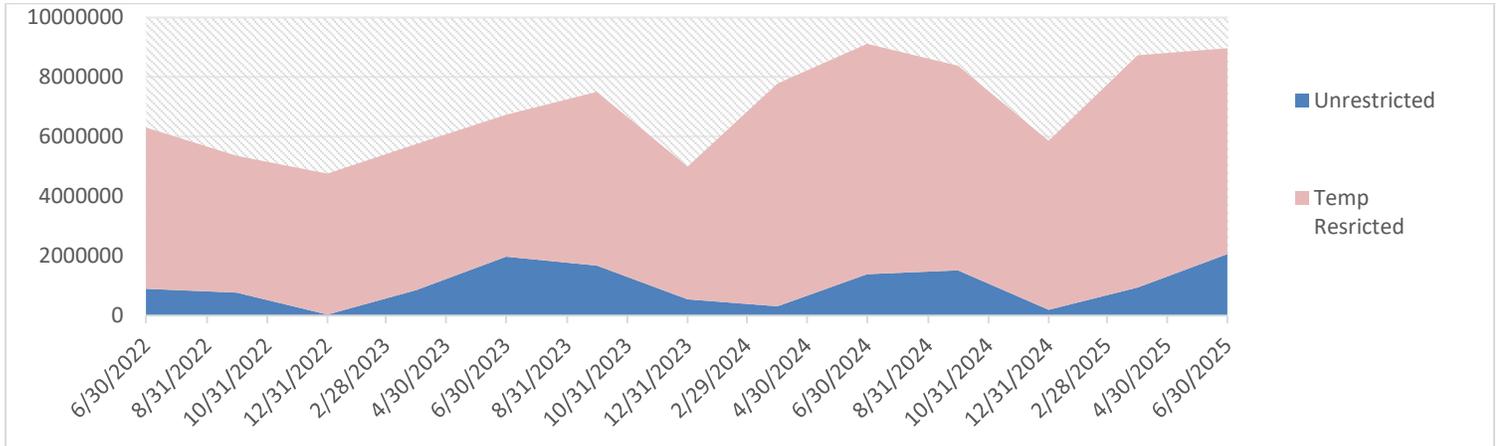
This policy becomes effective upon approval by the Board of Directors at a duly convened board meeting.

Update and Revision History

Date	Description of Change
MM/DD/YYYY	First approved by Board of Directors

Dashboard Report

Cash Flow Unrestricted and Temp Restricted Funds



Current Assets, Liabilities & Equity

Cash:

Temp Restricted \$6,915,301
 Unrestricted \$2,063,491

Total Cash \$8,978,792

Line of Credit *secured by Money*

Market
 \$0 of \$500,000

Other Current Assets

Prepaid Expenses \$66,016
 Prepaid Insurance \$23,788
 Unbilled Receivable \$174
 Security Deposit \$6,067
 Fixed Assets Net of Depreciation \$107,295
 Right of Use Asset – Operating Lease \$1,411,539

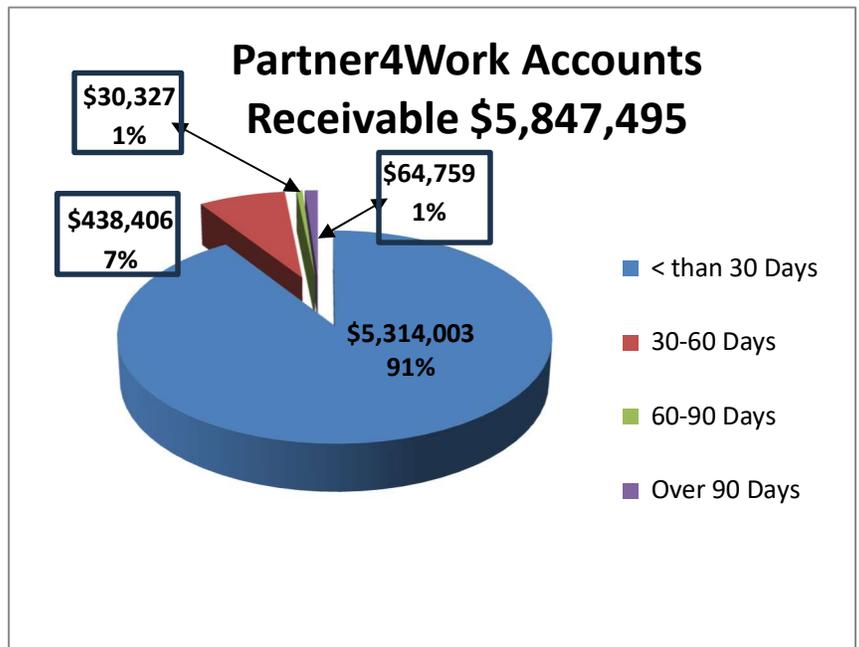
Liabilities

A/P \$5,323,780 (\$5,023,719 due to subrecipients)
 Accrued Vacation/Payroll \$368,590
 Accrued Contract Liability \$97,203
 Right of Use Liability-Operating Lease (current & long term)\$1,470,687

Equity

Unrestricted Net Assets \$849,305
 Temp Restricted Net Assets \$10,282,423**
 Net Income (\$1,950,999)

**Career Link \$57,701; M&G \$131,660; Sector Strat. \$4,268,842; Adult TANF \$3,509,731; L&E \$2,314,489
 This is reflective of activity through 7/1/2024

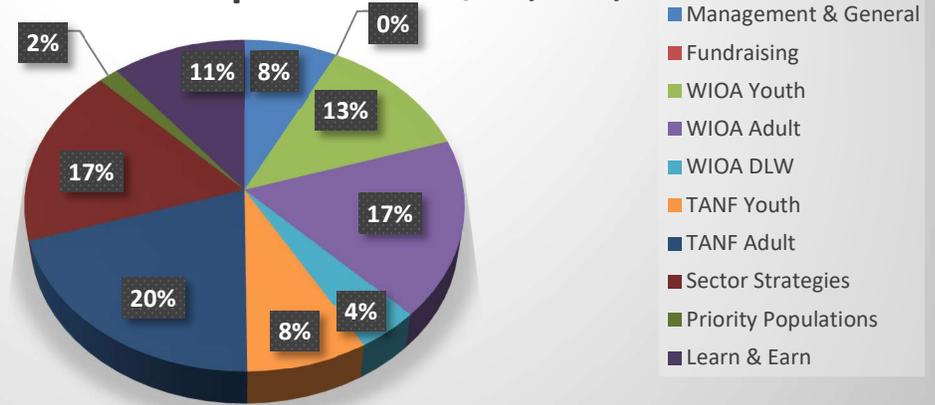


Items over 90+ days: DOJ \$64,759 Paid in full in August 2025

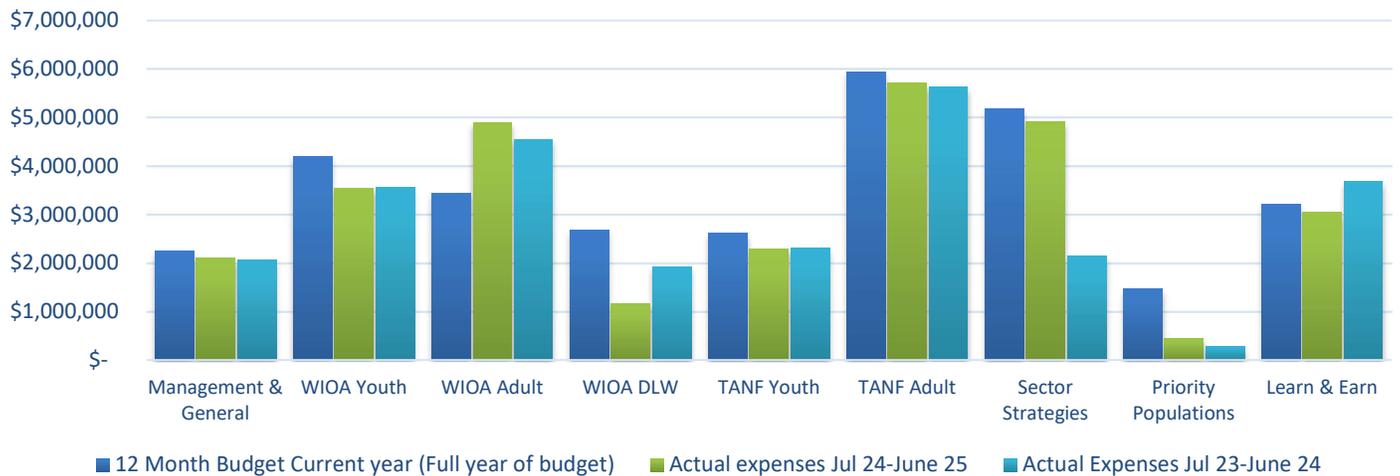
Dashboard Report Continued

Expense section

Total Partner4Work Expenditures \$28,122,305



12 Month Budget and Expense Comparison



Comments

WIOA Programs

- Youth: \$10K under the prior year and \$642K below budget, primarily due to decrease in number and value of provider contracts issued and underspending salary, wages & benefits.
- Adult: Over the prior year \$345K, attributed to increased direct program costs. Above budget by \$1.45M due to additional direct program expenses and salaries and benefits.
- Dislocated Worker: Under prior year and budget by \$774K and \$1.5M, respectively due to provider under-enrollment and IRTP allocations. Prior year, PA CareerLink East had additional costs for the move to the new location. The majority of DW funds have been transferred to adult to even out the spending trend.

TANF Programs

- Youth: Under the prior year by \$24K and \$323K under budget primarily due to direct program expenses and salaries and benefits.
- Adult: \$87K above prior year despite being \$220K below budget. The shortfalls under budget are in direct services and contractual spending.

Sector Strategies, Priority Populations and Learn & Earn

- Sector Strategies: \$2.7M increase over the previous year, but \$257K under budget. There have been significant increases under sector strategies from last quarter. While we had a slow start, most program picked up in the last quarter.
- Priority Populations: \$1M under budget and \$163K above prior year, largely due to lower-than-expected direct program spending and salary and benefits.
- Learn & Earn: \$173K under budget and \$643K below prior year. This program shifted formats and has brought payroll processing in-house. Provider invoices are lower this fiscal year due to the reduction in contract values. Due to funding constraints, we reduced youth hours to maintain number of youth served.

Conclusion

The organization ended the year strongly with active program engagement, despite some budgetary variances which were mostly explainable through program shifts, and/or strategic cost management.