



Stories for Engaged Learning

Grantmaking, Geography, and Leadership Case study: the Casalli Family Foundation

Effective grantmaking aligns donor legacy and family interests with a changing world. However, generational succession, geographic dispersion, a capital event, and/or changing trustee perspectives may create the need to redesign a foundation's grantmaking program.

Through a case study and small group discussion, this session will explore change strategies that honor family and community ties. Third generation Casalli family members now live far from the changing community which has been their foundation's focus for over 40 years. By discussing the Casalli Family Foundation's dilemma and considering their options, participants will learn about:

- Re-aligning strategic priorities and tactics
- Implementing change and honoring the foundation's community roots
- Philanthropic leadership and risk taking
- Board members' roles and engagement from points of geographic dispersion

Stories for Engaged Learning is a collection of case studies rooted in the practical experiences of family and private foundations navigating the challenges of creative effective philanthropy. Designed specifically for facilitated sessions at conferences, board meetings, and retreats, the case studies captivate the imagination and fuel active participation.

GMA Foundations consultants employ these stories to deliver fast-paced, useful workshops for groups of varying size. Contact Mary Phillips mphillips@gmafoundations.com for additional session descriptions and facilitation options.



Case Study: the Salvatore and Maria Casalli Family Foundation

Legacy and Responsibility

BACKGROUND: The Salvatore and Maria Casalli Family Foundation has long and deep roots in Barlow County. Three generations of family members have been business and civic leaders in the area through the family business, Casalli Metal Works. In 1985, brothers Joseph and Peter Casalli established the foundation, named for their parents, with a small endowment. Joseph’s son, Michael, and Peter’s daughter, Anne Marie, were added to the board in 1996.

The Foundation’s priority is the “physical and cultural well-being” of the county’s inhabitants. It makes numerous annual grants, from \$2,000 to \$100,000, to most of the county’s leading agencies for a variety of needs. Major annual grants are given to the regional hospital, the Italian Home, and the Industrial Museum. The family business was sold in 2000 and the foundation’s assets increased to \$30 million. In 2014, with the assets continuing to increase and Joseph and Peter retiring from the foundation, Michael and Anne Marie felt the need to add extra hands on the board. They appointed three next generation members in their early 30s, all of whom live in other states.

Refer to the Casalli family tree on next page.

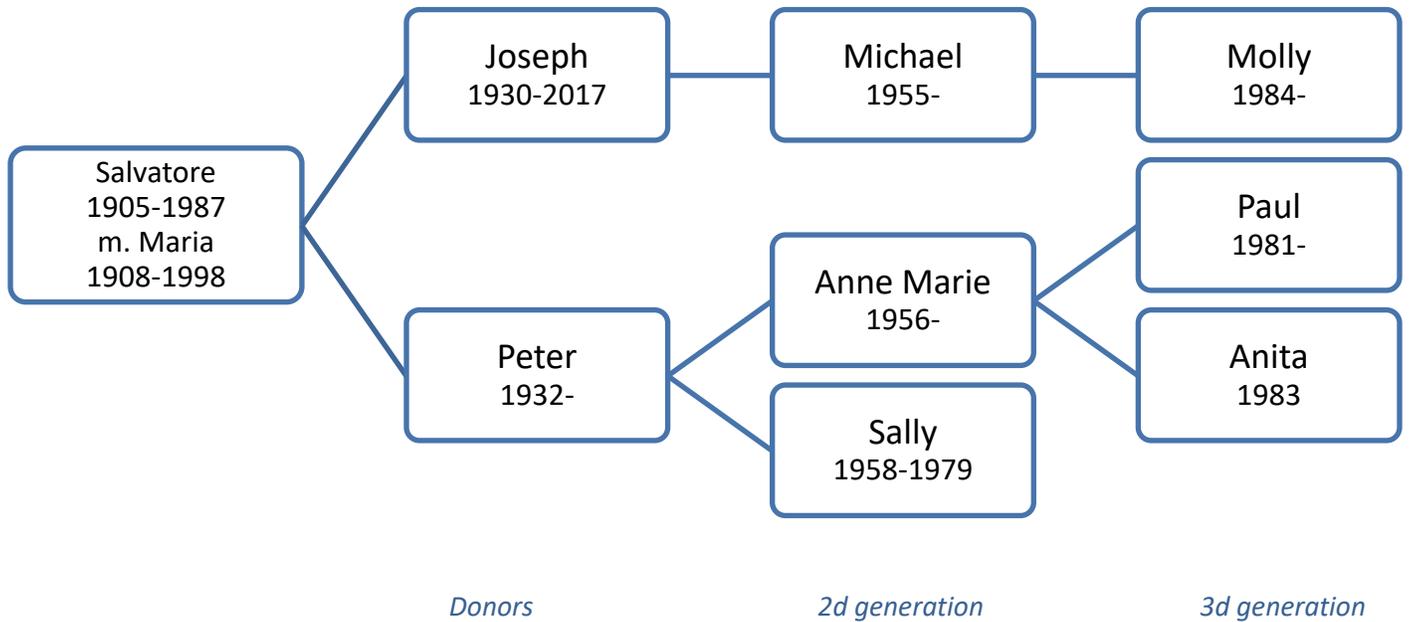
BOARD TRANSITION: The third-generation board members had left Barlow County for college and not returned, except for family visits. All are disconnected from Barlow and question whether the foundation’s funds should be dedicated to a region from which a majority of the board was now disengaged. One of the new trustees serves on the board of a small nonprofit and wants to help organizations in his “backyard.” All of the new board members agree that they are not well enough informed to direct distribution of funds to Barlow County and want to discuss geographic expansion. Anne Marie and Michael are concerned about legacy and responsibility to Barlow County.

GEOGRAPHIC FOCUS: Unsure of the foundation’s impact on the Barlow community, one of the new trustees did a little research before her first board meeting and learned that Barlow County was far from the thriving middle-class area in which the foundation had begun. Total population had been flat since 1999, and its composition had changed. Over 20 percent of residents are Latino, and a quarter of children speak a language other than English. High school dropout rates are second highest in the state. Unemployment is on the rise. In thinking about the foundation’s role in a changed community, where less than half the board members now live, many questions surfaced.

Discussion

- A. With differing interests and geographic priorities, how can the board develop a vision for the foundation’s future that will engage all trustees?
- B. How might the board begin to explore a strategic grantmaking program, particularly given the many needs in Barlow County and their allegiance to current grantees?
- C. Given the board’s geographic dispersion, if grantmaking stays focused in Barlow, how can they stay attuned to the County’s most pressing priorities?

The Casalli Family



Facilitated discussion

This case study is a tool for sparking deeper conversation among trustees, family, or peers in philanthropy when employed by an experienced facilitator as part of a *Stories for Engaged Learning* workshop.

You are free to use this case study for your own discussions as long as you give GMA Foundations appropriate, visible credit. We welcome your feedback after using this as a tool for family or board engagement.

Contact Mary Phillips at GMA Foundations, mphillips@gmafoundations.com to discuss the suitability of *Stories for Engaged Learning* workshops to your needs, additional case study topics, and GMA consultants' facilitation services.