

Scaling for Success September 9, 2021

Description

The success of family philanthropy is largely dependent on the operations and management of the people and processes that underpin the goals and activities of the effort. Giving families often reach an inflection point where they must consider bringing in outside professionals to manage their philanthropy for greater impact; however, it is often challenging to understand the practices that promote success. How do you develop the strategy and systems needed to maximize impact? When does a philanthropic effort require staff and what are the considerations for hiring? And what is necessary to build effective operations and reporting? In this webinar, learn how families have scaled their operations strategically for impact.

Replay Link

View the webinar [replay here](#).

Summary and Resource List

Webinar Takeaways

“Scaling for success really means managing change, and there is a lot at stake when you're managing change.” – Alexa Cortes Culwell, Open Impact

Families reach inflection points where they decide to scale the giving effort. Often, what catalyzes a scale up is:

- An influx of assets, planned or unexpected
- A new strategic plan
- A commitment to add more infrastructure to the organization

Additionally, many donor families are building up their philanthropy efforts as a result of external forces:

- Persistent critiques of philanthropy and wealth
- Broader consideration of payout, lifespan, and legacy
- New and non-traditional vehicles allowing for more giving
- Recent societal challenges (including COVID-19, racial reckoning, climate change, and the economy) needing more philanthropic support

Before scaling, it is critical to answer “first-order” questions around philanthropic purpose. While they may seem obvious, many families haven’t spent intentional time answering these questions that will guide their “why” and “how”. Important first-order questions are:

- Why are we doing this work? What motivates us as individuals, and as a family?
- What is our philanthropic purpose? What are our shared values, our family culture?

- What are we doing? What are the issues and focus areas we care about? What does impact look like to us?
- How are we doing this work? How do we show up as donors, board members, and community members?

Second-order questions answer the “how” – how will the organization move forward in its operations, governance, and grantmaking as it scales. These questions are informed and driven by answers to first-order questions. Some examples of second-order questions are:

- What kind of governing board do you want and need? Who will be on the board and what are their qualifications?
- Who makes decisions – who is on the board and what are their roles?
- What is the organizational design, culture, and staffing that will be put in place?
- What are the parameters – budget, staff size, assessment framework?

Terms and takeaways sourced from the “Scaling for Success” webinar transcript and presentation by Alexa Cortes Culwell, Open Impact.

Resources

- [2016 Conference on Scaling Impact](#) (Social Impact Exchange, 2016)
- [21st Century Private Foundations: Outsourcing for Impact](#) (Foundation Source)
- [It’s Not All About Growth for Social Enterprises](#) (Harvard Business Review, 2013)
- [Lessons in Scaling Initiatives for Maximum Impact](#) (GrantCraft, 2021)
- [In Times of Growth: Planning for an Influx of Assets](#) (NCFP, 2015)
- [Ramping Up Your Foundation: Key Considerations for Planning and Managing a Significant Increase in Giving](#) (Exponent Philanthropy and The Philanthropic Initiative, 2016)
- [Scaling Solutions Toward Shifting Systems](#) (Rockefeller Philanthropy Advisors, 2017)

Featured Speakers



Alexa Cortes Culwell is the co-founder of [Open Impact](#) and a longtime philanthropy advisor, speaker, and facilitator. For the past 25 years she has built and managed foundations and philanthropic initiatives for successful entrepreneurs, including serving as the founding CEO of the Charles and Helen Schwab Foundation. She recently completed a four-year appointment as a visiting practitioner at Stanford University’s Center on Philanthropy and Civil Society. Prior to Open Impact, Alexa founded the strategic advisory firm Philanthropy Futures in 2011. She has served on the Center for Effective Philanthropy’s board for more than a decade, and has been a long-standing board member of New Door Ventures. Her work has been cited in Harvard Business Review and Stanford Social Innovation Review. Alexa earned her undergraduate

degree from UC Berkeley and a Master of Nonprofit Administration from the University of San Francisco.



Carolyn Wall Sakata is Chief of Staff of a newly formed family office that supports the work of the Baszucki Family Foundation. For the past 15 years, she has worked in philanthropy with family foundations at varying stages. Prior to her work with the Baszucki family, Carolyn served as Managing Director of Sunlight Giving, a family foundation created in 2014 with annual grantmaking of approximately \$25M. During her tenure, she helped ramp up the private foundation, including hiring and managing staff, creating grantmaking and financial procedures, and representing the foundation externally among the nonprofit and philanthropic sectors. In addition, Carolyn helped launch Acton Family Giving and Solidarity Giving, two affiliated donor advised funds within the Sunlight Giving grantmaking portfolio.

Carolyn's previous experience includes working with multiple family foundations at Pacific Foundation Services, a brief stint at the City and County of San Francisco in the Department of Children, Youth and their Families, and work as a program officer at the Medina Foundation. She has spent most of her career in the nonprofit space, including working as a clinical social worker in community mental health settings. Carolyn has an MSW from Smith College and a BA in History and Hispanic Studies from Vassar College.



Kate Seng oversees GHR's grants management, supports GHR's governance work including serving as the Secretary to GHR's Board of Directors, manages GHR's client relationships, and oversees family engagement. In addition, Kate oversees GHR's higher education funding, including grants to the Henrietta Schmoll School of Health at St. Catherine University, the Opus College of Business at University of St. Thomas, and the Opus College of Engineering at Marquette University.

Prior to joining GHR Foundation, Kate served as consultant for the Minnesota Community Foundation, the Saint Paul Foundation, Jay and Rose Phillips Family Foundation and others. She was a senior manager at the Greater Twin Cities United Way, where she developed and managed community-wide initiatives focused on affordable housing, workforce development and anti-racism efforts. Seng was the district director for Minnesota's Congressman Bruce Vento, where she directed the Congressman's Minnesota efforts.

Kate earned a master's degree in public affairs from the Humphrey Institute at the University of Minnesota and a bachelor's degree in political science from St. Catherine's University. Kate serves on the Board of Directors of the Minnesota Council of Foundations (MCF), is Chair of MCF's Program and Conference Committee, and serves on the Catholic Community Foundation Grants Committee.