# Worksheet 2: *Considering Paid Staff or Contractors*

You've revisited the work that needs to get done in Worksheet 1. How much is beyond the time and expertise of volunteers or the team in your family business or office? As you look ahead, is it time to find additional part-time or full-time staff, a philanthropic advisor or consultant, and/or outsourced services?

The following questions can help you choose the staffing model that is right for you. Ask yourselves:

1. **At which stage of governance are we now? At which stage do we plan to be in two years?**
   e.g., controlling founders, collaborative, board-governed and staff managed

2. **Do we have sufficient support to successfully achieve our social impact objectives now and in the future?**

3. **Do we plan to add new social impact strategies or vehicles in the next two years, or expand those we have? How might that affect our operational needs?**

4. **Based on answers to questions 1 and 2 above and Worksheet 1, what work will we most need help with next?**

5. **Do our volunteers have additional time and interest to do this work? And/or are there staff at our business or family office that we're willing to pay if they have time and interest?**

6. **If yes to #5:**

   a. **Do they have the skills and connections they need to succeed? If no, are we willing to pay for new training and memberships to philanthropic associations?**

**b. Do they have the administrative resources they need to succeed (e.g., online grant application software, board portals, office space, and equipment)? If not, are we willing to pay for those resources?**

**c. Are they in the geographic area our philanthropy supports? If not, are we willing to have them work remotely or pay for regular travel to that area?**

## 7. If no to #5:

**a. Which staffing model(s) do we want to pursue? Why?**
e.g., paid family staff, paid non-family staff, outsourcing firm, contracted office manager, or philanthropic advisor.

**b. How comfortable are we in letting others run the philanthropy?**

**c. What concerns do we have and what information, practices, or policies do we need to address to help alleviate those concerns?**

**d. How much are we willing to invest in staffing (hiring/search, salary, benefits, professional development, travel)?**

**e. How much are we willing to invest in office and other administrative expenses?**

**8. Connecting the decisions above to our philanthropic purpose:**

    **a.  How visible or anonymous do we want the philanthropy to be? How might our staffing best support that goal?**
(Note: See the Worksheet 5 on transparency in the Governance Primer for additional help in answering this question).

    **b.  How might our staffing decisions affect our relationships with nonprofits, other partners, and the communities we serve?**

    **c.  How can we ensure our staffing decisions reflect our mission, values, and principles?**