



2020-2021

R.I.S.E. Task Force

Allocating the MacKenzie Scott Gift Dollars

A CASE STUDY ANALYSIS
COMMISSIONED BY
UNITED WAY SUNCOAST
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The following case study provides a high-level outline of the gift award and the R.I.S.E. Task Force initiative and recommendations. It then concludes with a detailed analysis of the most significant lessons to be garnered from the process.

EXECUTIVE SUMMARY

Philanthropist MacKenzie Scott gave more than a transformational gift to United Way Suncoast (UWS) in December 2020. She issued a clarion call to United Way Suncoast and the other nonprofit recipients benefiting from her philanthropy. The message was clear: extend your mission work, help more people, address the challenges brought on by the pandemic and the nation's social justice reawakening. Reach, Invest, Support and Empower community members.

Through thoughtful determination, United Way Suncoast created the R.I.S.E.(Reach, Invest, Support and Empower) Task Force and a blueprint that aligns with their new strategic plan while staying focused on the key impact areas: Early Learning, Youth Success and Financial Stability.

BACKGROUND

Founded in 1924 as the Tampa Welfare League, United Way Suncoast now represents a five-county region encompassing DeSoto, Hillsborough, Manatee, Pinellas, and Sarasota counties.

The concept behind the first joint-fund drive in 1887 in Denver, Colorado, remains valid today. Yet the United Way Suncoast has evolved and changed dramatically over the years, largely because the organization is a flexible system that responds and adapts to changing social conditions and social needs.

This flexibility and adaptability to the community needs at-large has no better illustration than that of the recent National Philanthropic Trust gift (commonly referred to by the benefactor's name, MacKenzie Scott) of \$20MM and the subsequent R.I.S.E. Task Force.

In late November 2020, staff at UWS received an unusual outreach claiming to hold a large award for the organization. The message was sent with such anonymity that initial responses were disbelief in the message's authenticity. A gift of this magnitude already represents an anomaly. Couple that with strict initial confidentiality, and it is not hard to conceive of the incredulity.

However, on December 3, 2020 the official award letter arrived confirming the \$20MM MacKenzie Scott gift was indeed a reality. Just one week later, the gift was made public at a press conference at Campbell Park Resource Center in St. Petersburg, FL.

Behind the scenes, the UWS leadership was already hard at work setting priorities, timelines and community outreach strategies and framing the decision making process. A gift of this magnitude needed strategy and clear plans.

The context for the work was complex. The CEO, Jessica Muroff, relatively new to the organization, was still working to align and build trust within the five-county region. Key staff were being promoted and reorganized to best suit the new structure. A comprehensive new strategic plan was in the final stages of completion and the world was still in the midst of a global pandemic.

“So many times in our careers we say, if only someone would give us a big pot of money, and then here it was.”

**DEBRA JACOBS
TASK FORCE MEMBER**

It was decided early on that the process would illustrate full transparency, 5-county representation, an openness to learning and sharing lessons learned, a strengthening of partnerships around the region and a commitment to honoring the donor. The team treated this gift as a community gift, giving the transparency and proactive communication a level of great importance.

The R.I.S.E. acronym was selected as a visual reminder of the mission of the Task Force.

REACH out to the most vulnerable in our community

INVEST in programs and services that

SUPPORT individuals and families and

EMPOWER our communities to RISE above circumstances.

The first undertaking was to convene a task force to represent the community in the distribution of the funds. The CEO, Executive Team, and board leadership created a matrix of regional and diverse representatives, and began the invitation process. Simultaneously, the search for the right facilitator was conducted and confirmed. Finally, the investment subcommittee of the finance committee of the Board determined how the money would be invested in the short term, prior to distribution.

The R.I.S.E. Task Force officially convened for its first live group meeting in May 2021. Its task: to determine a process and organization strategy for the transformational \$20MM MacKenzie Scott unrestricted one-time gift. The group would meet monthly, for four months, an hour and half each meeting.

R.I.S.E. Task Force: Meeting Overview & Work Plan

May 13	June 23	July 15	August 12
Introductions	Impact/Urgency pre-meeting survey on 28 strategic initiatives	Immediate Needs presented	Two pre-meeting surveys on potential allocation strategies and amounts
Mission, Objectives, and Must Haves	Prioritization matrix completed and presented: 8 initiatives emerged	UWS Endowment overview provided	Finalize task force recommendations
Determined information needed by task force members	Discussed allocation and leveraging options	Potential allocation strategies and amounts emerged	Develop criteria for communications strategy, reporting, and governance process

Early in the process key questions arose for the staff and task force to determine:

- Do we need to make any immediate investments in our community given our current crisis?
- Do we want to cover the full breadth of the areas we work on or narrow the choice to one or two areas to make sure we produce a significant change?
- What one or two things could we solve to create financial stability or financial mobility for the lives of our ALICE families?
- Time-frame? Do we spend this in three years with the risk of leaving a void, or choose a longer, i.e. 7+ year term?
- How do we market/brand the initiative(s) we choose to invest/address?
- How do we share the stories and successes?
- How do we ensure best systems to track data?
- How do we leverage this and use as a case study for UWS' incredible ability to create lasting change with transformational gifts?
- How do we ensure that 10 years from now we can look back and be proud of what we have been able to achieve?

“The task force said the spirit of this gift is to effect change and to do that as quickly as possible and we never lost sight of that.”

KARI GOETZ
CHIEF ADVANCEMENT OFFICER, UWS

Over the course of the four months, the Task Force, led by facilitator Michael Corley, diligently worked through these questions, among others, to bring forth recommendations on funding allocations to the UWS Board of Directors. A few of the most pressing points of discussion surrounded immediate needs based on COVID-19, how to ensure all counties were appropriately benefited, and focus areas in particular, whether to focus on one priority area, early learning or youth success, or spread funds amongst multiple priority areas.

R.I.S.E. Task Force Recommendations

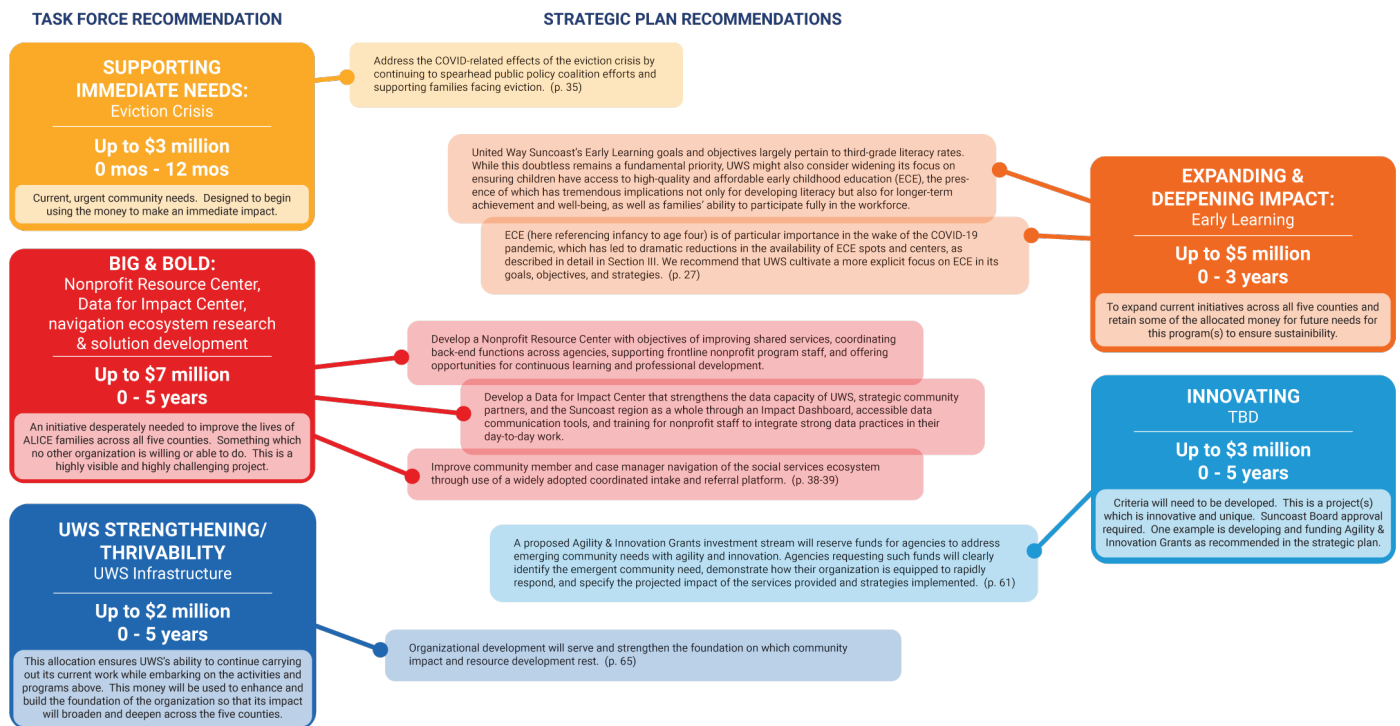
ALLOCATION STRATEGY	SUPPORTING IMMEDIATE NEEDS	EXPANDING & DEEPENING IMPACT	BIG & BOLD	INNOVATING	STRENGTHENING & THRIVABILITY OF UWS
AMOUNT	Up to \$3 million	Up to \$5 million	Up to \$7 million	Up to \$3 million	Up to \$2 million
TIME PERIOD	0 mos - 12 mos	0 - 3 years	0 - 5 years	0 - 5 years	0 - 5 years
DEFINITION	Current, urgent community needs. Designed to begin using the money to make an immediate impact.	To expand current initiatives across all five counties and retain some of the allocated money for future needs for this program(s) to ensure sustainability.	An initiative desperately needed to improve the lives of ALICE families across all five counties. Something which no other organization is willing or able to do. This is a highly visible and highly challenging project.	Criteria will need to be developed. This is a project(s) which is innovative and unique. Suncoast Board approval required. One example is developing and funding Agility & Innovation Grants as recommended in the strategic plan.	This allocation ensures UWS's ability to continue carrying out its current work while embarking on the activities and programs above. This money will be used to enhance and build the foundation of the organization so that its impact will broaden and deepen across the five counties.
FOCUS	Eviction Crisis	Early Learning	Nonprofit Resource Center, Data for Impact Center, navigation ecosystem research & solution development	To be determined	UWS Infrastructure

The first set of recommendations highlighted only three priorities; Immediate needs, expanding on our early learning work, and committing to an initiative that was big and bold and will improve the lives of ALICE families. The subsequent addition of innovation and capacity building were added to ensure the money was both future enhancing and set up for successful implementation. Ultimately, each of these recommended focus areas were selected for their ability to offer long term impacts directly aligned with the existing UWS strategic plan and current initiatives.

“If you are not communicating, it isn’t happening.”

ALEX SINK
TASK FORCE MEMBER

Strategic Plan Alignment



While the Task Force created recommendations for money allocation, the UWS staff created communications strategies and messages to further the commitment to transparency. They developed common talking points for UWS stakeholders to ensure shared understanding, verbal, nonverbal and graphic representations of the information, and stories to explain and illustrate data points. The task force included three essential imperatives in the communication. First, the diversity of the Task Force and its community wide representation. Second, the long-term nature of the gift. And finally, the alignment with the newly created strategic plan and how the recommendations are interconnected.

The final formal stage of the process was to solidify processes for reporting and monitoring. The unrestricted nature of the MacKenzie Scott gift was matched by the limited reporting requirements. All that is required for ongoing monitoring is an annual written report of no more than three pages containing a narrative description of the past year's progress on key initiatives, including lessons learned, the critical path for the next year, and how the funds from this grant are being used to advance your work. Additionally, UWS was asked to specify the extent to which the funds are re-granted to other non-profits and include annual audited financial statements and a current budget.

Beyond the grantor requirements, UWS will provide semi-annual updates to various stakeholders including Boards, Community Impact Committees, R.I.S.E. Task Force members, the UWS Internal team and a dedicated [UWS Website](#) for on-demand and accessible transparency to the public at-large.

KEY LESSON 1

A PROCESS OF EXCELLENCE

Preparation

The extensive preparation involved at the onset and throughout the process was a key subcomponent to the effectiveness of the R.I.S.E. initiative.

First, the Task Force was provided excellent resources throughout the process, beginning with the introduction packet. Going against the current norm of email and self-printing, UWS took the extra step to create and mail individual introduction packets which included a summary of the recently completed organizational strategic plan, information on the award and biographies of each task force member.

This ensured each member not only had convenient access to review the materials, but implied an importance and priority of doing so in advance of the first group meeting.

Throughout the process, Task Force members could add other printed materials or personal notes to the binder, keeping each member engaged and organized.

Next, careful preparation by the core team, facilitator and key staff, would bookend the group meetings to be certain the time together was most effective. This team would meet twice before each group meeting to prepare. Additionally, they would debrief directly following the group meeting to set strategy for the following meeting. As necessary, other staff resources and expertise would be deployed to ensure a robust and spherical view of each key point was illuminated. Task force members complimented the quality of research provided in a timely manner between sessions, particularly around points of divergent discussion. If there was any uncertainty or disagreement, additional background information was brought to the team to ensure they had full information to come to a decision.

Between meetings, there were requested assignments for task members, however, it was unanimous that the requests were appropriately balanced between productive forward motion of the initiative and an understanding of the task force members' individual outside responsibilities. The assignments were primarily light reading on any topics that required

**A PROCESS OF
EXCELLENCE**

**GATHERING OF THE
RIGHT PEOPLE**

**FEARLESS
INTENTIONALITY**

additional information not available at the time of the group session and relatively brief surveys gauging priority opinions. Materials provided both during and between group sessions were accurately adjusted to remain relevant and timely to the process.

Finally, as previously mentioned, each group meeting concluded with clear take away assignments. In addition, there was clarity of movement toward the end goal.

Sessions were concluded with a recap of what had been accomplished at that session, what was to be accomplished between sessions and the goals for the following session. Yet again, task force members unanimously complimented the thorough nature of communication and perfect balance of forward progress without overwhelming anyone. Lastly, the facilitator took time to connect the changes made at each step to the specific feedback given by the group. Yet another element solidifying the ownership the group felt toward each of the decisions made.

**“Jessica has created
a culture in the
organization of
abundance mindset.
There was no ‘we can’t’.”**

**MICHAEL CORLEY
TASK FORCE FACILITATOR**

Engagement

No process can be fully successful without full engagement of the necessary members. The R.I.S.E. Task Force core team went above and beyond to ensure full and inclusive engagement of all task force members.

First, it is not uncommon for committee assignments to begin with a robust group and dwindle as time progresses. This can be especially magnified when an engagement’s timeline is ambiguous or extended. The R.I.S.E. Task Force was provided a clear timeline from the onset of invitation. The concrete and limited nature of the time commitment allowed participants, even with the most robust schedule challenges, to secure time for full participation.

The focus on engagement continued throughout the entire process. The group sessions utilized a variety of engagement methods.

Presentations were given on key elements of information, while small group breakout sessions were used to accentuate individual voices that could potentially be overrun using only a large group setting.

In addition, much relevance was given to the intangible elements of the group meetings. First, the task force members commented en masse on the intuitive nature of the facilitator and his ability to bring each member’s voice into the conversation. They also pointed to a general atmosphere of inclusive trust and mutual respect, leaving members unhindered to bring even the most out-of-the-box ideas to the discussion.

KEY LESSON 2

GATHERING OF THE RIGHT PEOPLE

The Task Force Members

There can be no success in a team effort without the humans that comprise it. This initiative is no different. From the very commencement of the initiative, UWS made an intentional decision to bring the community together to decide how best to utilize this gift. Careful consideration was given by the CEO and her Chief Impact Officers to compose invitations to a group of community leaders that represented diversity of opinion, diversity of community need perspectives, geographic diversity, and diversity in relational familiarity to UWS. Although desiring inclusivity, they resisted casting too wide a net, in favor of a methodically selected group offering appropriate representation.

In addition to the characteristics above, the final task force represented wide expertise including technology and entrepreneurship, community development, finance, education, community foundations and government. They also held a variety of power bases and differing spheres of influence and included a mix of UWS board members and non-board members.

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The Core Team

The internal team leading the initiative garnered extensive praise from the task force members. In particular, the CEO gained accolades for her selection of a highly skilled outside facilitator as well as her ability to delegate the process fully. The designated project manager, the Director for Governance and Strategic Initiatives, was also highly praised for her organization and availability to the task force members.

Many members noted the open ethos these moves created for the group atmosphere. Specifically, having a third party facilitate safeguarded any perceptions of bias or personal agenda.

Next, the committee was comprised of additional key staff beyond the CEO and Director of Governance and Strategic Initiatives. In particular, these key staff were seen by members as adding critically important subject matter expertise. This expertise allowed task force members without certain knowledge to gain confidence in their own ability to make appropriate decisions for the group.

Finally, as mentioned, the facilitator hired to lead the task force was a topic of considerable applause by all involved. He not only showcased great expertise in framing dialogue around initiatives but also projected an authentic belief in the organization and the task at hand. Most notably, the facilitator was able to move the group forward while simultaneously allowing everyone to voice thoughts and opinions. He was able to keep the focus and engagement of the group on the tasks at hand by staying completely present and utilizing his intuitive sense when someone seemed to have an opinion they were holding back. In particular it was noted by many that he made sure everyone left the room feeling they owned the result.

This core team showed excellence through their superior organization, communication and objectivity. Overall, this allowed for high levels of trust among the group which in turn aided healthy dialogue. The group acknowledged openly that each task force member would come to the table with a personal or organizational perspective and agenda. However, directly addressing this elephant in the room hindered its ability to override the task force's collective wisdom.

Many members commented on the equality that permeated the room, confirming the team element without the presence of unintended internal power structures. Task force members unanimously agreed on the absence of negative communication patterns such as group think or disrespectful disagreement. On the contrary, differences of opinion were discussed openly, thoroughly and with civility.

“We are not going to tuck this award away in an endowment and check a box. We are going to go out there and talk about what we are passionate about.”

KARI GOETZ
CHIEF ADVANCEMENT OFFICER, UWS

KEY LESSON 3

FEARLESS INTENTIONALITY

The most significant contribution this case study illuminates can be found in the fearless intentionality that underlies the entire effort. In three distinct ways, UWS moved beyond antiquated thinking that permeates the nonprofit sector and serves as a vast limiting force.

Transparency

Many of the National Philanthropic Trust winners expressed concerns a gift of this magnitude would negatively impact future donations through a perception future money was not needed. In contrast, UWS was steadfast from the very beginning that the gift and all of its benefits would be communicated and celebrated with the community at large.

Each step of this process was laid on a foundation of transparency and broad accountability. In practical application, this began with the public press conference kicking off the initiative and continued through the regularly updated website and public webinar outlining the task force recommendations. It also included public acknowledgment of how success was to be measured over time and how unused funds would be handled.

Mission Alignment

“Chasing dollars” is a common challenge for nonprofits. The term refers to the shape shifting that some organizations attempt to do in order to gain access to grant dollars. Large unexpected gifts are a rarity; however, this same shape shifting is a risk in that scenario. UWS remained constantly devoted to keeping their primary mission unwavering. Choosing instead to hold it sacred and front facing while still looking for ways to enact bold amplifications to the programs most needed in the community.

The R.I.S.E. Task Force unintentionally benefited from the recent finalization of an extremely detailed and community-centered strategic plan. Members were not only provided a briefing on this plan in the inaugural packet but also reminded of the plan’s core elements throughout the process. The final recommendations reflect the clear connection to the mission and a lack of chasing new initiatives outside of the scope of United Way Suncoast focus areas.

**A PROCESS OF
EXCELLENCE**

**GATHERING OF THE
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**FEARLESS
INTENTIONALITY**

Revolutionary Futurism

Finally, and perhaps most aspirationally, the core team, led by the CEO, intuitively understood the spirit of the gift and its benefactor. They took bold, unprecedented action in planning for the distribution of these funds while illustrating attitudes and decisions that fly in the face of the status quo for the nonprofit sector.

First, unlike many of their fellow winners, UWS declined to place any portion of the money into reserve accounts. The current healthy state of their reserves cannot be disregarded as it relates to this decision. However, more pressing was the desire to stay true to the intent for the gift as set out from MacKenzie Scott herself.

This pandemic has been a wrecking ball in the lives of Americans already struggling. Economic losses and health outcomes alike have been worse for women, for people of color, and for people living in poverty. Meanwhile, it has substantially increased the wealth of billionaires.

I asked a team of advisors to help me accelerate my 2020 giving through immediate support to people suffering the economic effects of the crisis. They took a data-driven approach to identifying organizations with strong leadership teams and results, with special attention to those operating in communities facing high projected food insecurity, high measures of racial inequity, high local poverty rates, and low access to philanthropic capital. - **MacKenzie Scott**

The UWS team recognized that this money was meant to have immediate and tangible impacts on the lives of real people in the community. Through this recognition, the Task Force recommendations allocate the full amount of the award to be distributed over the next 5 years.

Next, UWS embraced the reality that quality results require quality implementation. They stood firm on the belief that enhancing their programs in this sizable manner could not be accomplished successfully with current capacity without extensive harm to current initiatives. Disavowing the commonly held belief that nonprofits should work below capacity levels, the UWS team allocated 10% of the funding, roughly \$2M, to internal capacity and infrastructure, thus ensuring capacity was not a hindrance to success.

CONCLUDING THOUGHTS

Overall, this UWS team, task force, and facilitator under the leadership of the CEO, led from a place of abundance and not scarcity. They challenged traditional beliefs and processes to forge intentional paths to fundamentally change their community. Through these bold actions, UWS hopes to inspire more organizations to go beyond status quo and more grantors to allow flexibility for innovation and world-changing impact.

**“MacKenzie Scott’s unrestricted gift
represents a defining moment in philanthropy.”**

**JESSICA MUROFF
UNITED WAY SUNCOAST, CEO**

SPECIAL APPRECIATION

Special thank you to all those who participated in the interviews and focus groups used to compile this case study. Participants included R.I.S.E. Task Force members, UWS staff and leadership as well as the initiative’s facilitator.

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