



CASE STUDY

Edward's Journey

How we helped Edward translate personal legacy into a collaborative pilot with long-term impact for Indigenous communities.

THE NEEDS

- Clarify philanthropic priorities
- Navigate a complex partner landscape
- Create impact beyond traditional giving

OBJECTIVE #1

Expand educational access for Indigenous students

OBJECTIVE #2

Connect giving to institutions Edward trusts and values

OBJECTIVE #3

Create a legacy-focused philanthropic commitment

ROOTED IN EDUCATION AND COMMUNITY

Edward's philanthropic vision was shaped by his Cherokee heritage and his belief in education as a pathway to opportunity. As he revisited his estate plans, he wanted his giving to support Indigenous students in meaningful ways, connect to institutions he valued, and create opportunities that could strengthen leadership, access, and long-term opportunity within Native communities nationwide.

FROM INTENT TO OPPORTUNITY

Working closely with Edward, Strategic Philanthropy took a close look at the philanthropic landscape to understand how his vision could come to life at scale. We spoke with organizations serving Indigenous communities and considered which had the experience and capacity to steward a transformative gift. Through research, conversations, and relationship building, this work led to selecting a grantee well positioned to partner with institutions and carry an initiative forward over the long term.

A PILOT FROM THE GROUND UP

We worked closely with Edward, the grantee, and participating universities to design a new pilot program from the ground up. Much of the work centered on helping the grantee build a program with clear goals, dedicated staffing, and strong partnerships—one capable of executing a transformative gift over time. By aligning donor intent, grantee expertise, and institutional needs, we shaped a program designed to last and grow.

CREATING A LASTING IMPACT

The pilot allows Edward to engage with his philanthropy during his lifetime while also shaping a lasting legacy. It expands opportunity for Indigenous students pursuing advanced degrees and gives the grantee and university partners a new way to work together. As the program develops, what is learned will guide future strategy and help more Indigenous students access the education that shaped Edward's own path.

TESTIMONIAL

"We are excited to provide opportunity for Native Americans with access and financial resources that would not otherwise be available. Starting this program in our lifetime is a chance to absorb and refine our legacy - the importance of quality education."



www.stratphilanthropy.com
info@stratphilanthropy.com
773-244-5185