



CASE STUDY

Harrison Family Foundation

How Strategic Philanthropy helped a growing family foundation stay connected, aligned, and effective across shared and individual philanthropic priorities.

THE NEEDS

- Capacity to manage rapid grantmaking growth
- Scalable, reliable back-office infrastructure
- Consideration of unique goals for each family branch

OBJECTIVE #1

Ensure smooth, compliant distribution of significant annual grantmaking

OBJECTIVE #2

Strengthen collaborative family giving while supporting individual branch priorities

OBJECTIVE #3

Create a reliable, scalable back-office platform that takes administrative burden off the family

GROWING FAMILY PHILANTHROPY

When the Harrison Family Foundation faced the passing of its patriarch, an influx of capital created growth and complexity. Annual giving expectations increased, while three family branches brought distinct priorities and working styles. The family recognized that sustaining this scale of philanthropy would require a partner who could simplify complexity, support busy family members, and preserve flexibility.

BUILDING OPERATIONAL CAPACITY

Strategic Philanthropy began by reviewing systems, policies, and workflows. We worked with family members to establish clear processes for expenses, travel, reimbursements, and grantmaking. Through interviews and joint planning sessions, we helped surface shared priorities alongside individual interests. This work created a common operating framework that strengthened collaboration, reinforced accountability, and made it easier for branches to work together.

MANAGING COMPLEXITY AT SCALE

As annual grantmaking approached \$20M, Strategic Philanthropy assumed responsibility for daily operations. We implemented centralized grant systems, maintained branch-level reporting and served as the contact for grantees. Quarterly meetings and family retreats strengthened collaboration, supported shared priorities, and created space for individual branch interests. The family was able to manage growth, remain compliant, and respond quickly to opportunities—without added strain on their personal lives.

A FAMILY GIVING WITH CONFIDENCE

Today, the Harrison family experiences philanthropy as manageable, flexible, and well supported. Shared initiatives continue to anchor the family's giving, while individual branches pursue distinct interests with confidence. Strategic Philanthropy's ongoing stewardship allows the family to stay engaged without being weighed down by administration, ensuring their father's vision continues in ways that fit their lives today and evolve over time.

TESTIMONIAL

“Strategic Philanthropy gives our family the structure and support we need to grow thoughtfully. They’ve made complex giving easy and have helped us stay connected and attend to our individual giving priorities while honoring our father’s legacy.”



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