



CASE STUDY

Stewart's Legacy

How Strategic Philanthropy, Ltd. partnered with a foundation's trustees to interpret intent, build alignment, and lasting change where no formal plan existed.

THE NEEDS

- A defined plan for intent when the donor is deceased
- Aligning trustees around a shared philanthropic direction
- Impact that can responsibly scale and endure

OBJECTIVE #1

Translate limited lifetime giving into a clear philanthropic mission

OBJECTIVE #2

Establish shared understanding, roles, and decision-making to support effective stewardship

OBJECTIVE #3

Ensure the foundation can be sustained impactfully in perpetuity

AN UNPLANNED LEGACY

Stewart's giving during his lifetime was deeply personal and driven by immediate needs rather than a plan. He supported modest efforts toward neighborhood animal welfare efforts and Jewish learning in ways that reflected his values but were not intended to scale. After his passing, the foundation faced the responsibility of translating that charity into a durable philanthropic legacy.

IDENTIFYING A SHARED PURPOSE

Strategic Philanthropy was brought in to help trustees examine Stewart's lifetime giving and understand the underlying intent behind his actions. Through education, discussion, and landscape analysis, we helped the board move from Stewart's stand-alone acts of generosity to a shared understanding of purpose, scope, and responsibility that provided clear direction for decision-making in the absence of Stewart's direct voice.

LINKING PARTNERS, SCALING IMPACT

With new clarity, the work shifted to building policies and protocols that would help the foundation scale responsibly. We also helped the foundation assess the scope of the issues Stewart cared about, identify where resources could make a difference, and move beyond isolated giving by addressing root causes and supporting organizations with the capacity to scale their own solutions through coordinated, multi-year investments.

A LEGACY DESIGNED TO LAST

With trustees who now understood how to build and operate a successful foundation, its work accelerated, developing funding programs to sustain investment in shelter medicine, workforce development for veterinary professionals, and scholarship support. By moving from ad hoc giving to coordinated long-term commitments, the foundation has become an influential player in the issue areas that Stewart cared about.

TESTIMONIAL

"We've built so much in our first 7 years with Strategic Philanthropy - a high-impact legacy giving program, a path to succession planning and a deep network of grantee partners that have been brought together to solve long-term problems."



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