



# CASE STUDY

## Franklin's Foundation

Helping bring a family closer together by clarifying purpose, strengthening governance, and engaging the next generation.

### THE NEEDS

- Family alignment on mission, values, and governance
- Support to achieve big impact with limited resources
- Support in next generation transition

### OBJECTIVE #1

Establish a shared purpose and strategic focus for the foundation

### OBJECTIVE #2

Create a governance framework for stable family leadership and succession

### OBJECTIVE #3

Create outsized impact with resources beyond grant funding

## FAMILY AT A CROSSROADS

When the Franklin family engaged Strategic Philanthropy, giving was driven by personal commitments with no clear structure. Grant decisions felt informal and personal, and priorities varied across generations. Family dynamics began to undermine enjoyment of participating in the foundation. The need for shared direction became more pressing. The family sought support to bring greater clarity, focus, and cohesion to their philanthropic values.

## BUILDING SHARED PURPOSE

We began by facilitating family retreats and guided conversations to help clarify mission, values, and priorities. Through structured learning and dialogue, each family member was able to articulate what mattered to them. We developed governance systems, board roles, and succession plans. These efforts transformed informal decision-making into a thoughtful, transparent framework that strengthened trust and accountability.

## GAINING A PARTNER AND RESOURCE

As the foundation evolved, we became their back-office as well as their advisor. We supported grantmaking, learning opportunities, and field engagement. By introducing peer funders and issue-area experts, we helped the family deepen its understanding and refine its strategy. We also supported leadership transition policies that ensured continuity through personal and generational change.

## INFLUENCE BEYOND SMALL SIZE

Over time, the Franklin family developed a reputation for engaged, values-driven philanthropy. Though modest in size, the foundation was able to punch above its weight, by hosting fundraisers, convenings, and other strategies to expand its influence. The family helped strengthen organizations and advance issues they cared about. Our long-term partnership enabled the foundation to remain focused, adaptive, and effective for more than 15 years.

### TESTIMONIAL

*"Strategic Philanthropy truly brought our family together. They helped our family stay connected with purpose. Their guidance gave us confidence that our values would carry forward our father's mission and our impact would be meaningful."*



[www.stratphilanthropy.com](http://www.stratphilanthropy.com)  
[info@stratphilanthropy.com](mailto:info@stratphilanthropy.com)  
773-244-5185