CASE STUDY
Monica's Journey

How we helped Monica find clarity, deeper engagement, and a more fulfilling philanthropic experience aligned with her values and priorities.

THE NEEDS

- A manageable and meaningful giving portfolio
- Flexibility for spontaneous giving
- A more fulfilling philanthropic experience

OBJECTIVE #1

Focus and streamline giving to amplify impact and engagement

OBJECTIVE #2

Align Monica's giving with her deepest values and long-term vision

OBJECTIVE #3

Create a more fulfilling philanthropic journey rooted in purpose and connection

GENEROUS BUT OVERWHELMED

Over time, Monica's charitable giving had grown organically. She routinely responded to personal requests, community fundraisers, and annual mailings; eventually, her DAF was supporting more than 60 organizations in relatively small amounts. Treasured though each gift was, she began to feel overwhelmed by the sheer volume and she no longer knew which organizations reflected her priorities or where her support was having the most impact.

IDENTIFYING PATTERNS AND PRIORITIES

Our first efforts were to listen and bring clarity to what mattered most to her. Monica had defined focus areas, and we needed to understand how her current giving supported those areas. We examined her portfolio for the effectiveness and impact of each organization to identify gaps and overlap. The process brought to light charitable patterns that gave her a more grounded sense of how her giving aligned with her values.

IMPACT AND FLEXIBILITY

Reviewing the 60+ organizations made clear that volume hindered meaningful engagement. While consolidation felt like a shift, Monica embraced the chance to go deeper with fewer grantees. Reducing to around 20 organizations—each supported more significantly—aligned her giving with her top priorities. She also wanted space for spontaneous giving. We created a two-track approach: a core strategic portfolio and a flexible ad hoc budget, so she could remain responsive while staying intentional.

A FULFILLING EXPERIENCE

We tried not to make it a chore. The experience was collaborative, reflective, and affirming. We had intimate conversations about what mattered to her and created space for reflection. It wasn't just strategy—it was about making the process personal, comfortable, and meaningful. Now she's exploring site visits and using this clarity to guide her estate and legacy planning.

TESTIMONIAL

"It was hard, but SP helped me focus my giving to make it easier to manage without giving up flexibility to be spontaneous. I'm enjoying getting to know my grantees and have a better sense of how I can help make a difference with my giving."

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