



## Craig and Sarah

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### A couple streamlines their giving and prepares to involve their children

- Opportunity** Several years ago Craig and Sarah sold their company and have since become significant philanthropists. With solid giving experience under their belts, they approached Sarah Hopper for ways to streamline and be more efficient. They were frustrated by a process they rarely enjoyed and sought guidance about how to approach their three children (all in their twenties) about getting involved. Ultimately, they wanted to feel more connected to their giving without having to commit more time.
- Process** Sarah began her work by interviewing Craig and Sarah separately to collect candid thoughts on a variety of topics, including decision-making, time commitment, family involvement, giving style, and budget. She then met with the couple to explore their values, clarify priority issue areas, review operational structure, and outline a process for informing the kids. She also worked with them to define a vision for future giving.
- Result** Sarah submitted a comprehensive report that began with a "snapshot analysis." She first revealed the trends and patterns that Craig and Sarah had identified that were problematic and then continued with recommended solutions designed to allow the couple to maintain connections with specific grantees without getting bogged down with time commitments. Her report challenged the couple to consider new approaches to their philanthropy and embrace a strategy guided by an established vision. Her report also included:
- Draft mission statement
  - Guiding principles
  - Immediate and long-term recommended action steps and timeline
  - Resource section to guide decision-making
  - Conversation plan and suggested language for a discussion with their kids to thoughtfully invite them to the "family philanthropy table"
  - Specific grantmaking budget aligned with mission and priorities
- Value** Sarah created a giving structure and plan with tools and systems that relieved her clients' frustration and allowed them to embrace the future. The couple discovered a new approach to their extensive philanthropic work, and a way to thoughtfully engage their children in a conversation about giving. The once overwhelming process of giving became a clear and focused approach that worked with their lifestyle, priorities, and needs; not against them. By stepping back to reevaluate, the couple was able to make progress and move forward.

*"As an independent advisor, Sarah is extremely attuned to her client's needs and goals. She brings tremendous knowledge and experience and effectively uncovers and addresses all of the 'issues.' We felt that her approach was specifically designed for us, and she made sure we were comfortable with the journey and at the same time challenged us to see our philanthropy and our process in new ways." ~Craig & Sarah*