Fractional Strategy Leadership for Philanthropy, Nonprofits & Mission-Driven Capital

Led by Matt George (Former 30-year nonprofit CEO & Harvard Business School Executive Leadership Coach) with an operator-led delivery team.

What we do

We serve as your fractional Chief Strategy Officer for philanthropic and nonprofit initiatives, helping you turn high-stakes intent into a clear plan, the right structure, and steady execution, while specialists handle legal, tax, and compliance.

The problem we solve

Most founders, families, and funders don't struggle because they lack resources. They struggle because:

- The mission is real, but the goals are fuzzy
- Money flow and "what counts" gets confusing fast
- Too many vendors, opinions, and options create delays
- Risk shows up in the gray areas between strategy, legal, compliance, and operations

We close the gaps so your initiative moves forward cleanly, credibly, and without unnecessary complexity.

Where we fit

Think of us as your "owner's representative" for your organization or initiative:

- You bring the vision, resources, and relationships
- We bring the nonprofit and philanthropic operating context, sequencing, and decision discipline
- Specialists bring formal opinions, filings, and compliance controls

Result: you keep control, reduce risk, and avoid expensive missteps and decision drift.

Signs you need us now (or you will soon)

If any of these are true, you will almost always need this role within 90 days:

- "We know we want impact, but we're not clear on the model yet"
- "We're deciding between DAF, fiscal sponsorship, or forming a 501(c)(3)"
- "We have assets (facility, fund, portfolio) and want to activate them for mission"
- "We're talking to lawyers/accountants but don't know what we should be asking"
- "There are multiple stakeholders and decisions keep getting revisited"
- "We need credibility and documentation without slowing everything down"

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Our lanes

1) Clarity, direction, and decision-making

- Define mission, goals, and boundaries
- Translate intent into a concrete, fundable plan
- Create the decision memo that legal/compliance needs to move quickly

2) Strategy-to-structure mapping

We help select the right path and sequencing across:

- Donor-advised funds (DAFs)
- Fiscal sponsorship and compliance umbrellas
- 501(c)(3) formation (when it truly makes sense)
- Hybrids (philanthropy + impact initiatives) where appropriate

3) Partner orchestration and "seam management"

- Coordinate the moving parts across legal, compliance, accounting, and internal stakeholders
- Keep everyone aligned to the same goals, language, and timeline
- Prevent vendor-led sprawl and unnecessary billable churn

4) Ongoing advisory once it's live

- Monthly or biweekly strategy cadence
- Governance support (board-level guidance)
- Program decisions, partner vetting, and operational guardrails

Not our lane (and how we handle it)

We do not provide legal, tax, or compliance opinions. Instead, we make those partners more effective and keep you protected.

We do now:

- Practice law or provide legal opinions
- Provide tax advice or issue tax opinions
- Make compliance determinations (what is allowed, restricted, or prohibited)
- Run day-to-day administrative project management without a strategy seat
- Serve as a fiscal sponsor ourselves
- Execute fundraising operations (grantwriting, donor ops, campaign management), unless explicitly scoped through a partner

If you need any of the above:

We help you get the right expert in place, frame the right questions, and keep the work aligned to your goals so you do not waste time or money.

Glassroot
PARTNERS

How we work with others

We often collaborate with partners such as:

- Compliance monitors and fiscal sponsorship umbrellas
- Strategy or program design specialists
- Attorneys, CPAs, and accounting teams

Our role is distinct: we represent the client's interests end-to-end, translate between parties, and keep strategy, structure, and execution coherent.

Example of what this looks like in practice

Phase 1: Clarity Sprint (2–4 weeks)

Output: a short Decision Memo that answers the questions every advisor will ask:

- Mission and target outcomes
- Use of funds and money flow
- What is in bounds vs. out of bounds
- Risk flags (geography, conflicts, reputational and compliance constraints)
- Recommended structure and sequence

Phase 2: Buildout Retainer (8–16+ weeks)

- Coordinate partners, decisions, and documentation
- Keep momentum without chaos
- Reduce risk through better sequencing and clean narratives

Phase 3: Ongoing Advisory

- Stay involved as strategic counsel as the initiative grows
- Prevent drift, governance gaps, and operational overreach

Next step

A short working session to confirm:

- the mission and target outcomes
- intended use of funds and constraints
- the fastest viable structure and sequence
- what partners are needed and what can wait

If it's not the right timing, we'll tell you clearly and recommend what to do for the next 60–90 days so you're set up when it becomes real.

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