



# CREDO

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PHILANTHROPY ADVISORS

**HELPING DONORS GET RESULTS**



## *Our Commitment*

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Our commitment is to help clients improve the lives of people and communities through effective grantmaking. Our client's vision is our North Star. In partnership with our clients, we help clarify and realize that vision.



# *Our Clients*

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We serve a diverse group of clients:

- *Individuals*
- *Couples*
- *Families*
- *Foundations, private and public, of various sizes*

Some are starting-up without professional grantmaking staff while others are professionally staffed with a long history of grantmaking.

Some seek to support established organizations with a track record while others are drawn to more innovative, untested ideas and strategies.



# *Our Services*

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Our services, tailored to meet the unique needs of each client, include:

- Developing grantmaking priorities and goals, along with actionable strategies to achieve them
- Reviewing and assessing performance, including impact, of existing grants and grantees
- Researching and assessing new, innovative grantmaking prospects
- Conducting mapping and landscape analysis in an area of existing or potential focus to help our client understand more clearly the nature and scope of a problem and possible solutions, including opportunities to collaborate with other donors and stakeholders to address the problem
- Training, coaching and ongoing support for grant officers, foundation executives and board members, including family members



## *Our Recent Projects*

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- Comprehensive landscape analysis of K-12 education programs and services, including more than 60 service providers, to help our client understand the opportunities for new investment or redeployment of current investment to achieve its objective to improve educational opportunities and outcomes for all students
- Comparative analysis of poverty reduction strategies in Canada and other communities in the U.S. to help our client understand and evaluate viable and effective approaches to reduce poverty meaningfully and sustainably
- Due diligence investigation of grant outcomes and a plan for strengthening accountability and measurable results
- Training and development sessions for family members starting-up philanthropic planning and grantmaking and helping with setting grantmaking priorities



## *Our Service Perspective*

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Too often consultants issue written reports that land on a dusty shelf or in a dark file drawer, never to be acted upon or seen again. To avoid this outcome, we look to build an ongoing relationship with our clients, assisting with implementation and fine-tuning of the plans and approaches crafted in consultation with them. Many of our engagements, therefore, continue for three months or longer, depending on our client's needs.



## *Our People*

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We leverage our extensive experience in the non-profit, legal and business sectors to help our clients make informed decisions about their giving. We have worked with grantmaking organizations and service providers in the areas of education, health care, social services, public media, community development and the arts.



## *Tracy L. McFerrin*

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Principal and co-founder, is a former senior officer for a private U.S. family foundation with over \$800 million in assets. In that role, Tracy led the development of giving strategies in education, neighborhood revitalization and social services and co-founded funder collaboratives in education. She has been an invited speaker, panelist and moderator on issues in philanthropy and has served as board chair for several non-profit organizations in the areas of youth development, medical research and public television. Tracy is a graduate of Howard University in Washington, D.C. and Harvard Law School. She lives in Toronto, Ontario with her husband and daughter.



## *Maurice Alvin Watson*

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Principal and co-founder, is a former partner and chairman of an AmLaw100 law firm. As a lawyer, advisor and board member in education, health care, biomedical research, the arts and youth development, he has consistently sought to be an independent voice, challenging leaders to acknowledge their blind spots and examine critically what is and is not working and why. A frequent speaker on issues of equity, inclusion and opportunity for all, he comes from a working-class family, attended inner-city schools in his hometown of Kansas City until winning a scholarship to attend an independent college preparatory school, and graduated from Harvard College and Harvard Law School. He lives in Kansas City, Missouri.

For more information about Credo  
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