8 Years Meaningful Impact

MATTISON ADVISORS



Eight years of partnerships, strategy, and meaningful work that have strengthened organizations and helped move resources into communities.

20
STATES SERVED

6,000+
COMMUNITY BASED ORGANIZATIONS ELEVATED

9,000+
GRANTS DISTRIBUTED BY CLIENTS

$2.75B
FUNDING DISPURSED

IMPACT REPORT

A LETTER FROM CHRISTINA

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- Shaping Philanthropy
- Impact in Practice
- Advancing Strategy at Pivotal Moments

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IN THEIR WORDS

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8 YEARS. AND STILL, GRATITUDE.

MATTISON ADVISORS

A LETTER FROM CHRISTINA

Gratitude. Partnership. Purpose.

As Mattison Advisors celebrates eight years, I find myself reflecting with tremendous gratitude on the people, partnerships, and meaningful work that have shaped our journey.

We have had the privilege of working alongside clients and partners whose collective efforts have strengthened more than 6,000 organizations, distributed more than 9,000 grants, and deployed more than $2.75 billion to advance meaningful impact in organizations and communities.

This Impact Report is both a reflection on what we have accomplished together and a celebration of the clients and partners who make this work possible.

"It reflects what is possible when strategy, purpose, and partnership align."

Over these eight years, MA has been invited into some of the most important moments for the organizations and leaders we serve—moments of growth, transition, possibility, and sometimes uncertainty. That trust has never been lost on me. Behind every strategy, recommendation, and engagement are people deeply committed to their organizations, their communities, and the impact they hope to make.

Thank you for inviting MA to be part of your journey, for trusting us during pivotal moments, and for allowing us to contribute to work that continues to transform organizations and communities. We are proud of what we have built together and deeply grateful for the trust that has made it possible.

With gratitude,



Christina Mattison
President & CEO

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WHERE STRATEGY BECOMES IMPACT

Meaningful work takes many forms.

Behind the numbers are eight years of partnerships, decisions, strategies, and moments that have shaped organizations and influenced how resources move into communities. MA's impact has taken many forms; these are a few of the ways that work has come to life.

Strengthening Organizations

6,000+ ORGANIZATIONS STRENGTHENED

MA has worked alongside organizations to strengthen the strategies, structures, and capacity that sustain their missions over time. Often, this work begins when an organization recognizes that its aspirations have outgrown its current systems—or that greater clarity, alignment, and organizational strength are needed to move forward.

Shaping Philanthropy

9,000+ GRANTS | $2.75B+ DEPLOYED

MA has worked alongside clients and partners responsible for deploying significant philanthropic and community investment resources. Together, we have examined how capital is deployed, where it can have the greatest impact, and what strategies, structures, and practices are needed to steward those resources with intention. Behind that work are defining decisions about legacy, responsibility, community, and what philanthropy can make possible.

Impact in Practice

LEGACY | STEWARDSHIP | COMMUNITY INVESTMENT

Behind the numbers are defining moments—when organizations and leaders were called to make thoughtful decisions about the resources entrusted to them and the impact they hoped to create. Across eight years, MA has helped clients bring greater intention, strategy, and stewardship to those moments, from honoring longstanding philanthropic legacies to building new models for corporate and community investment.

Advancing Strategy at Pivotal Moments

CLARITY | ALIGNMENT | FORWARD MOMENTUM

Some of MA's most consequential work has occurred when organizations and leaders were facing decisions without an obvious or predetermined path forward: moments of growth, transition, possibility, and uncertainty.

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WHERE STRATEGY BECOMES IMPACT

Strengthening Organizations

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Examples

1 **A regional economic development organization was preparing for its next chapter and seeking to crystallize a future direction grounded in its current strengths and emerging opportunities.**

MA engaged staff, leadership, board members, and community stakeholders through a strategic planning process informed by a mosaic of evidence—organizational assessment findings, stakeholder perspectives, peer benchmarking, and data-driven analysis. The process transformed candid perspectives and data-driven insights into shared priorities, practical roadmaps, and a stronger framework for long-term impact.

2 **An engaged philanthropy organization had a powerful vision but needed the strategy and organizational foundation to bring it to life.**

MA helped align its mission, priorities, philanthropic model, grantmaking, and investment practices—creating a strategic plan that gave the organization greater clarity about how it would operate, make decisions, and advance its impact.

3 **A youth-serving nonprofit was ready to strengthen the infrastructure supporting its mission and future growth.**

MA worked with its leaders and board to examine fundraising strategy, advancement operations, board engagement, and internal capacity. Together, they began building a more coordinated and sustainable approach to securing the resources and relationships the organization needed to serve young people over time.

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WHERE STRATEGY BECOMES IMPACT

Shaping Philanthropy

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Examples

1 **After three decades of giving, a family foundation arrived at a defining crossroads: continue in perpetuity, pursue a different model, or bring its work to a thoughtful close.**

MA helped the family look back before moving forward—examining decades of grantmaking, exploring possible paths, and listening carefully to the values beneath each decision. The result was an intentional spend-down strategy that honored the foundation's legacy, provided clarity to its grantee partners, and carried the family's philanthropic commitments into the future.

2 **A corporation's commitment to community impact had grown—and its philanthropic infrastructure needed to grow with it.**

MA helped transform that commitment into a corporate foundation built for lasting impact, developing the strategy, governance, grantmaking practices, evaluation framework, and operating model needed to move from aspiration to action. What began as a vision for more purposeful giving became an enduring platform for community investment.

3 **A philanthropic organization was ready to reimagine how it engaged partners and invested in communities.**

Rather than beginning with a predetermined answer, MA designed and facilitated a process that brought philanthropic partners, community members, and stakeholders into the work of shaping the model together. Through candid conversation, shared learning, and collective decision-making, they co-designed an approach that aligned the organization's mission, governance, investment practices, and grantmaking around a more responsive and community-informed vision of philanthropy.

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Examples

1 **After three decades of giving, a family foundation reimagined how its legacy would endure.**

Through an intentional spend-down strategy, legacy approach, and thoughtful transition for grantees and community partners, the foundation created a path forward that honored its history and carried its values into the future.

2 **As a corporation's commitment to community impact grew, its approach to giving evolved with it.**

What began as community investment became a formal philanthropic platform supported by a clear strategy, governance, grantmaking infrastructure, and evaluation framework.

3 **When an engaged philanthropy organization set out to reimagine how it partnered with and invested in communities, a new model took shape.**

Co-designed with philanthropic partners, community members, and stakeholders, the resulting framework aligned mission, governance, and investment practices—and was recognized as a best-practice model within its global network.

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WHERE STRATEGY BECOMES IMPACT

Advancing Strategy at Pivotal Moments

CLARITY | ALIGNMENT | FORWARD MOMENTUM

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Examples

1 **An organization with an ambitious mission needed greater clarity about the impact it hoped to create and the path required to achieve it.**

MA brought together organizational assessment, stakeholder perspectives, scenario planning, and Theory of Change development to help translate that ambition into a clear strategic framework—one with shared priorities, measurable outcomes, and a stronger foundation for future decisions.

2 **A leader was confronting consequential questions about succession, legacy, and the future of an organization built over decades.**

MA created the space to consider each possible path, understand its implications, and make a thoughtful decision grounded in evidence and values. What emerged was not simply a transition plan, but a way forward that honored the organization's history while providing clarity for those who would carry its work into the future.

3 **An organization stood at the threshold of a significant new opportunity, but vision alone was not enough.**

MA helped leadership examine whether its strategy, governance, operating structures, and accountability practices were ready to support the next stage of growth. Together, they strengthened the institutional foundation needed to pursue the opportunity responsibly and with confidence.

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IMPACT IN ACTION

Real Partners. Lasting Change.

Behind every engagement is an organization navigating its own set of opportunities, challenges, and decisions. While the work has taken many forms over eight years, these stories offer a closer look at how strategy, purpose, and partnership have translated into meaningful organizational and philanthropic impact.



Haines Family Foundation

LEGACY



M&T Bank Charitable Foundation

COMMUNITY



Hilco Redevelopment Partners Group

CAPACITY



PIDC Community Capital

STRATEGY

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HAINES FAMILY FOUNDATION

Legacy



Mattison Advisors advised and assisted me in succession planning for our Foundation. The depth of their research is something that I could not have accomplished on my own. Christina is world-class in all areas of philanthropy. Her breadth of knowledge and experience is vast and her ability to get to the heart of my needs has been a wonderful experience."

Holly Haines
President
Haines Family Foundation

The Moment

After more than 30 years and approximately $20 million in grantmaking, the Foundation was considering what its next chapter should look like.

MA's Role

Scenario planning, an analysis of three decades of grantmaking, legacy planning, spend-down strategy, change management, and communications.

The Impact

A thoughtful pathway for transition, intentional deployment of remaining resources, and preservation of the family's philanthropic legacy.

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M&T BANK CHARITABLE FOUNDATION

Community



Mattison Advisors has been a phenomenal partner, working with M&T Charitable Foundation on a deep body of work. Their work is strategic, substantive, innovative, equitable and forward thinking. MA built trust and rapport with our core team and executive leadership team, garnering excitement and deep engagement throughout our work together. The executive coaching was excellent!"

Dominque Goss
Executive Director
M&T Bank Charitable Foundation

The Moment

As the Foundation entered a new chapter, it sought to bring greater focus, consistency, and clarity to its philanthropy while remaining responsive to the distinct needs of communities and nonprofit partners across its regions.

MA's Role

MA designed and facilitated a comprehensive strategic review informed by stakeholder perspectives, a community needs assessment, benchmarking, and data-driven analysis. The work helped shape updated giving priorities, clearer grantmaking criteria, a more consistent evaluation process, and an operating model designed to strengthen transparency, accessibility, and community responsiveness.

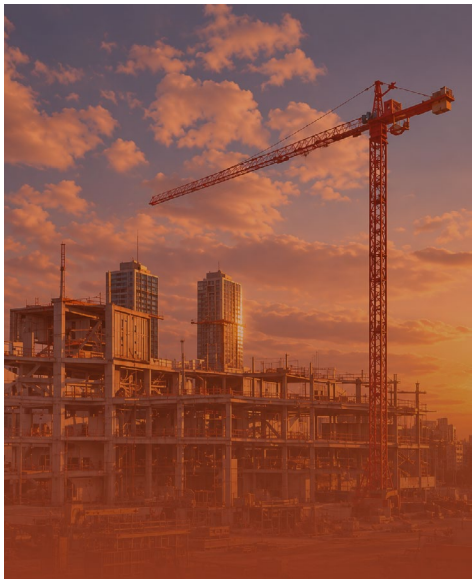
The Impact

A more focused and inclusive approach to philanthropy organized around three giving pillars—economic mobility, thriving communities, and arts and culture—with clearer pathways for grantmaking, stronger alignment across regions, reduced barriers for nonprofit partners, and an enhanced ability to measure and communicate impact.

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HILCO REDEVELOPMENT PARTNERS

Capacity



Mattison Advisors assisted with shaping the mission, vision, and strategic priorities for our Corporate Affairs Department, which handles all Government and Community Relations, Corporate and Philanthropic Giving, Workforce Initiatives, and DEI across six project cities. The data they were able to provide, and the demonstration of ROI was invaluable to our company."

Founding Senior Vice President
Corporate Affairs
Hilco Redevelopment Partners

The Moment

Hilco Redevelopment Partners was investing in communities through its corporate social responsibility efforts and sought to establish a more intentional and structured approach to philanthropy, including the development of a corporate foundation.

MA's Role

MA assessed the company's existing corporate social responsibility efforts and helped translate its commitment to community investment into a formal philanthropic model. The work included development of the Foundation's operating model, governance structure, grantmaking infrastructure, charitable giving strategy, strategic initiatives, and evaluation framework.

The Impact

The engagement resulted in the establishment of a structured corporate philanthropic platform and foundation, creating the strategy and infrastructure needed to move from individual community investments toward a more intentional and coordinated approach to corporate philanthropy.

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PIDC COMMUNITY CAPITAL

Strategy



he Mattison Advisors team engaged deeply with our staff, Board members, and many key stakeholders in our community in a way that brought forward candid perspectives and uncovered new opportunities for PIDC."

Anne Bovaird Nevins
Former President
PIDC

The Moment

As a public-private economic development organization serving Philadelphia, PIDC sought to better understand its current organizational state, engage key stakeholders in shaping its future, and establish greater clarity around its strategic direction and intended impact.

MA's Role

MA conducted an organizational assessment and facilitated a stakeholder engagement process that incorporated perspectives from staff, Board members, and community stakeholders. The work informed the development of a Theory of Change, Strategic Framework, intended impact statement, performance measures, and procurement strategy.

The Impact

The engagement provided PIDC with a more structured framework for connecting organizational priorities to intended impact and measuring progress over time. The resulting strategy incorporated perspectives from across the organization and community, creating a stronger foundation for organizational alignment, decision-making, and future priorities.

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IMPACT BEYOND OUR ENGAGEMENTS

Service is part of the work.

Our commitment to impact has always extended beyond the work we are hired to do.



5,810+

HOURS OF VOLUNTEER SERVICE

$200,000+

IN PRO BONO PROFESSIONAL SERVICES

Over eight years, MA has invested time, expertise, leadership, and resources in organizations and causes that matter to the communities we serve. Through Board leadership, volunteer service, and pro bono support, we have sought to contribute not only as advisors, but as active participants in the work of strengthening organizations and communities.

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ABOUT MATTISON ADVISORS

Strategy Grounded in Context, Purpose, and Partnership

Mattison Advisors is a strategic advisory and management consulting firm working at the intersection of strategy, philanthropy, leadership, and social impact. MA partners with organizations, foundations, corporations, families, and mission-driven leaders to navigate complex opportunities, strengthen strategy and organizational capacity, and advance meaningful impact.

Our Approach

We meet our clients where they are. Our work brings together research, stakeholder engagement, strategic thinking, and practical implementation to develop strategies grounded in each client's goals, context, and the perspectives of the people most connected to the work.

Strategic Advisory

Navigate complex challenges, establish strategic direction, strengthen organizational capacity, and move from strategy to implementation.

- Stakeholder & Community Engagement
- Visioning & Program Design
- Organizational Development
- Strategic Initiatives & Benchmarking
- Revenue Strategies

Individual & Family Philanthropy

Develop thoughtful philanthropic strategies that align giving with values, priorities, desired impact, legacy, and the future.

- Family & Private Foundation Start-Up
- Philanthropic Strategy, Management & Giving Portfolio Design
- Multi-Generational & Legacy Planning
- Impact Evaluation & Grantmaking Strategy

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EIGHT YEARS, AND STILL,GRATITUDE.

Meaningful Work. Meaningful Lives.

Eight years of Mattison Advisors have been shaped by meaningful work, trusted relationships, and the opportunity to contribute alongside people and organizations deeply committed to making a difference.

To every client, partner, colleague, and friend who has trusted MA, challenged our thinking, shared your vision, and invited us to be part of your journey, thank you.

The numbers throughout this report tell one part of our story. The relationships, lessons, and moments behind them tell another. Both have shaped who we are today.

As we reflect on eight years, I remain deeply grateful for what we have built together and for every meaningful moment along the way.



Christina Mattison
President & CEO

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