Learn, Share, Evolve
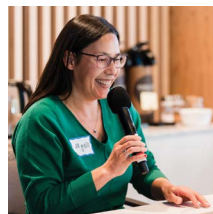
Transform
philanthropy.

That's the collective vision of the PEAK Grantmaking community. It inspires us to be change agents for our organizations and the sector, guided by the Principles as a values-driven, equity-centered road map. And it sparks us to be emergent learners, creating cultures of collaboration and curiosity.

This edition of the *Journal* is dedicated to PEAK Grantmaking's Learn, Share, Evolve Principle—and, throughout this supersized issue, we illuminate how this three-part call to action can yield results in transforming grantmaking practice. Inside, you'll find an action planner, reflections on promising trends and practices, how-to guides, and stories from the field about how our member community is putting this Principle into practice.

We offer deep appreciation to guest editors **Janet Camarena**, **Traci Johnson**, and **Anthony Simmons**, and to board liaison **Eusebio Díaz**, who partnered with the PEAK team to cocreate this suite of insights and resources; and to the 18 contributors who have generously shared stories of their journeys to learn, share, and evolve. We hope you will be inspired anew by the possibilities to advance your own progress toward transformation.

Lita Ugarte Pardi (she, her, ella)
Knowledge and Learning Director

Betsy Reid (she, her, hers)
Chief Strategy Officer

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Satonya Fair delivers her opening address at PEAK2023. *Photo by Greg Smith.*

Three Words and a Call to Action

This is the season of our fifth Principle: Learn, Share, Evolve. So it's apt that we took inspiration from this Principle to reenvision the way we dive deeply into it. Rather than creating a suite of online resources, as we've done for our first four Principles, we offer this expanded edition of the *Journal*, delving into the many ways that this Principle can serve as an engine for transformation. I hope that these three words—and this call to action— inspire your journey to help transform grantmaking practices.

Our Own Case Study in Learning, Sharing, and Evolving

The five Principles began with a PEAK working group of staff and volunteers. Over several months back in 2018, I was part of the team that codeveloped the concepts that would become the **Principles for Peak Grantmaking**. Gathered across many rooms, a cadre of staff, board members, engaged champions, and thought leaders rolled up our sleeves with the intent to create a roadmap for values-based, equity-centered grantmaking practices. Many of us were inventors and lever-pullers at our own organizations, but we weren't always seen or valued as the change agents we now know ourselves to be. Our formula for each Principle: a cup of lessons learned, a few tablespoons of best practices, and a few dashes of trend spotting. These were the learnings we shared, discussed, and used as a jumping-off point to envision the evolution we wanted to see in the sector.

Our list of Principles started out long. In time, we whittled the list down to the five most critical to the sector's transformation. We unveiled them in 2019 with *Courage in Practice*, our white paper that, today, continues to be our most frequently accessed publication with more than 30,000 downloads to date—and 15,000 in the past year alone! The feedback we receive from member surveys and ongoing conversations confirm how deeply the Principles are valued. And as we approach the five-year mark of their launch, we're excited to revisit the Principles, reflecting on what we've learned, what you've shared about their impact, and how they can best evolve to serve us going forward. For our team, the Principles are a North Star that guides our internal values and practices as well as the tools and resources we offer our community. At our 2023 retreat, it filled my heart to see PEAK's board and staff working together on big, new ideas, aligning around ways to improve member experience, and grappling with how best to prioritize and pace for success.

In that same gathering, I shared the evolution in my own thinking that had started by shifting my focus from institutions to the individuals who power them: I don't know if PEAK can truly change how an organization operates, but I do know that *you* can change your organization in ways big and small. My aspiration is for PEAK-inspired learnings to be an essential part of your career and knowledge toolkit, ready to use and share at every opportunity. We will focus on you, and know that the ripple effect you create will never truly end—reaching your team, your work colleagues and leaders, throughout your organization's practices and processes, and onward to the sister- and partner-philanthropies you work with. Evolution is a beautiful thing, and it starts with us.

Evolution 27 Years in the Making

It's also worth noting how much PEAK has evolved in its first two-and-a-half decades. At the time of our origin, as a small peer community gathering under an intermediary, just coming together was its own act of disruption. With no staff and little money, our founders and early champions endeavored to identify better ways of moving dollars into communities, to refine staffing structures for grants management teams, and to uplift the role and function we've devoted ourselves to.

As we grew in numbers, we began to disrupt status quo thinking by streamlining practices and opening space for higher-order concerns like relationship-building and innovation. Over time, we became a hub for grants management system vendors and user groups, testing new features and platforms. Our tent expanded in recognition of grants management as a collective endeavor requiring many competencies. We created safe spaces at diners, in chapter meetings, and in the hallways of our conferences. At the end of each meeting, we'd ask each other, "What did you learn that you'll take back to your home institution?" And we kept the dialogue going by actively documenting and sharing how we each were championing change and progress in our CONNECT forums.

Over time, we learned that more efficient and effective ways of moving dollars could positively impact the interactions nonprofits and communities have with their funders, especially throughout the grant lifecycle. We learned that we might even be able to intentionally advance equity by embedding it in PEAK's mission and approaches—without sacrificing the practical guidance we know members crave. Advancing equity and improving grant practices are complementary, and we must be unified in challenging the community to act on anything that helps advance racial equity.

We have evolved from a meeting and conference presenter to a convener focused on the *experience* we want members, friends, staff, and engaged champions to have whenever we are together—whether in small peer community settings or at PEAK's annual convening. Now, we are engaging in more multi-directional conversations, living our Principle to learn, share, and evolve with each opportunity to come together in community.

The Path Ahead

The path ahead for PEAK will be shaped by our staff, our board, and each one of you. To stand in solidarity around our highest values—that grantmaking practices can and should elevate and advance equity—we must commit time and effort to the learning that is required. We must be clear in stating, pursuing, and sharing our ideals as we continue to iterate and grow toward them. And we must remember that learning is not always a path forward, but can instead be an opening up of new directions where the things we know well fall away with each passing step and a landscape transformed by our convictions rises to meet us. Learn. Share. Evolve. Three words and a call to action. Can you hear it? Let's go! ⋀

Satonya Fair
(she, her, hers)
President and CEO

The **Evolution** of Grantmaking Practice Since 2020

By Elisha Smith Arrillaga and Kevin Bolduc

For decades, calls for change in philanthropic practice have come from both philanthropic and nonprofit leaders who have asked funders to listen to, trust, and support their grantees; provide more unrestricted funding; streamline and simplify processes; and pursue greater racial equity and justice. Even though making these kinds of changes was absolutely in funders' own control, the forces of habit, distrust, disconnection, and the desire to maintain control—among other factors— together conspired to create inertia for many funders.

For example, in our nearly two decades of tracking nonprofits' experiences with funders, The Center for Effective Philanthropy (CEP) has seen little change in the levels of provision of unrestricted support or the amount of time that nonprofits spent completing funders' application and reporting requirements. More broadly, looking across tens of thousands of data points from years of grantee surveys, CEP could see that, with the notable exception of foundations that solicited and acted on comprehensive grantee feedback at regular intervals, most foundations had not been improving in the eyes of their grantees.

Rather than investing in their own change, the real costs of funder inaction, over years, were instead borne by communities and nonprofits that too often were starved of the kinds of resources that would make them most effective in creating the impact that funders envisioned.

Change after 2020

In 2020, interlocking health and humanitarian crises rocked even the insulated world of funders and laid bare the long-standing structural inequities and racism that pervade every issue on which funders focus. The near-simultaneous killings by police of Ahmaud Arbery, Rayshard Brooks, George Floyd, Breonna Taylor, and others sparked an intense call for funders to address systemic racism, in particular by directing more funding to communities of color and the nonprofits deeply rooted in—and led by— those communities.

To their credit, many funders did spring into action. More than 800 **signed onto the Council on Foundations' Philanthropy's Commitment During COVID-19 Pledge**, which called on funders to work differently. These funders committed to loosening restrictions on existing and new grants, to streamline reporting, to listen to and help lift the community voices affected, and to "learn from these emergency practices" in order to change "more fundamentally... in more stable times."

And those things did happen. Over the past three years, CEP surveyed and interviewed nonprofits and funders about how funders learned and how they evolved in response to these crises. Our findings were published as a three-part series of reports, *Foundations Respond to Crisis.*

"In 2020, our earliest studies showed that a majority of funders increased grantmaking levels over what had been budgeted. And the vast majority of funders either accelerated existing efforts or changed their practices by implementing new ones."

In 2020, our **earliest studies** showed that a majority of funders increased grantmaking levels over what had been budgeted. And the vast majority of funders either accelerated existing efforts or changed their practices by implementing new ones.

- Almost all foundations reported **placing new focus** on reaching Black, Latinx, and lower-income communities—including, often, increasing grant support to them.

- Most foundation leaders said they reckoned with racism and paid greater attention to racial equity in their work. These changes ranged from explicitly incorporating antiracism into their missions and internal practices to updating application processes in order to reach more nonprofits led by people of color.

- Nearly all funders said they **loosened or eliminated restrictions** on existing grants, most often by reducing or waiving reporting requirements, reducing what's asked of grantees, and making new grants as unrestricted as possible—though only about 20 percent said they were increasing much-needed multi-year unrestricted support.

In addition, the field also saw other examples of these commitments, ranging from the **billions of dollars in social impact bonds** issued by Ford Foundation and other funders to the widely joined PEAK community effort to **drive the adoption of oral or other forms of reporting** requirements.

Learning and evolution

While changes were needed to confront the crises of 2020, by 2021, funders and nonprofits alike were questioning whether they would last. After all, there's nothing to compel funders to permanently adopt new ways of operating.

The good news is that early evidence suggests these changes may be sticking.

In 2021, virtually all funder leaders surveyed by CEP **said** that their organizations were working differently compared to early 2020. They most frequently reported streamlining processes to reduce the burden on grantees and providing more unrestricted support—changes they said they will sustain. One in five said they had maintained all changes made in 2020, and another 40 percent said they had sustained most changes. Nearly all funders that had increased grantmaking to communities of color intended to continue those efforts.

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Nonprofits felt those changes. In **CEP interviews** with a representative set of nonprofit leaders receiving grants from foundations, most said they experienced greater flexibility and responsiveness from their funders, especially in terms of more flexible processes and more unrestricted support. In addition, most said they were recognizing greater foundation focus on racial equity—though some were quick to point out a continuing gap between the rhetoric and reality of those funders' commitments.

Responding to CEP surveys, thousands of grantees also revealed real changes in their experiences, as detailed in the report *Before and After 2020: How the COVID-19 Pandemic Changed Nonprofit Experiences With Funders*. CEP has always seen that funders can make and sustain changes when they commit to collecting and acting on comprehensive grantee feedback. But the changes CEP observed in the data after 2020 are larger and more widespread than before.

Grantees whose funders asked them for feedback report that, compared to before the pandemic, they

- spend 25 percent less time on application and reporting processes;
- find proposal processes to be more helpful in strengthening the efforts funded by the grant; and
- receive slightly more unrestricted support: 30 percent of grants versus 23 percent pre-2020.

Sustaining change

These changes are positive and important, but there's room for much more. Even now, only relatively small proportions of grants are unrestricted, let alone directed to the kinds of often smaller, community-rooted nonprofits whose sustained and strengthened efforts are needed to address continued systemic inequities.

We suggest several imperatives for funders to hold themselves accountable for sustained change.

Change your default mindset. Many of us are creatures of habit, and philanthropy is no different. Funders need to be attentive to the way that the systems they've created can tempt them back to prior default thinking—for example, providing relatively small, single-year restricted grants while collecting extensive amounts of information. Those defaults show up in the structure of grantmaking systems, board write-ups, and data priorities. For example, grantmaking systems could be built to prompt unrestricted, multiyear grants by default, and ask a program officer to justify a change. Board agendas could summarily stop including time to discuss individual grants and instead devote time to discussions of community needs and strategies for addressing them.

Address diversity on funder boards. Nearly half of the leaders in CEP's recent study said that their boards were the biggest impediment to their foundation's ability to advance racial equity. Funders whose boards were comprised of at least 25 percent people of color were more likely to have adopted practices to support both grantees and historically marginalized communities—both in terms of increasing funding to communities of color and in changing their processes to reach new communities. And those funders with more diverse boards more frequently reported sustaining some or all of the changes they made since 2020. Increasing board diversity is an urgent need, as **study** after **study** shows that foundation boards are not reflective of the communities funders seek to serve.

Use demographic data in decision making. To help track these kinds of changes and commitments to equity, it's imperative to understand the leadership demographics of nonprofit partners. Nearly **40 percent of interviewed funders** said that they had begun collecting demographic data since the beginning of the pandemic—particularly

regarding nonprofit executive leadership. Communities of practice on this topic have grown within PEAK Grantmaking, and **Demographics via Candid** provides a path for the field to collect and use this data in a systematic way with minimal burden.

Work in communities of funders. Change is hard, and philanthropy lacks the kind of binding accountability structures that compel change in other sectors. So, working with others focused on supporting similar issues is important. There are many, including **PEAK's affinity groups**, the CEP Learning Institute, and GEO Communities of Practice, just to name a few. Another notable example is the growing trust-based philanthropy movement, which advocates for and helps create collective guidance for funders to act with great trust and a focus on equity.

Listen and share power. One key trust-based practice is to listen carefully and act on what you learn. Provided with the confidentiality of a third-party process, feedback can hold funders accountable. It can also, when disaggregated, reveal important differences in experiences across groups of partners. Listening is key, but it isn't enough. It needs to drive both a deeper understanding of the needs of people and communities served, as well as the actions that allow those communities to influence funders' directions and approaches.

This edition of the *Journal* makes visible many of the ways that funders can and do change. Now, the challenge for all of us is to not let up, even when change has left us tired. We must use the learnings from these experiences to further accelerate our efforts toward even greater evolution in pursuit of more effective and just philanthropy. At CEP, we're optimistic, even though the sector still has a long way to go. ⩓

Imperatives we suggest for sustained change

- **Change your default mindset.**
- **Address diversity on funder boards.**
- **Use demographic data in decision making.**
- **Work in communities of funders.**
- **Listen and share power.**

Elisha Smith Arrillaga, PhD, (she, her, hers) is vice president, research, at the Center for Effective Philanthropy.

Kevin Bolduc (he, him, his) is vice president, assessment and advisory services at the Center for Effective Philanthropy. He is also a former member of PEAK's board of directors.

From left: Anthony Simmons, Amber Lopez, Satonya Fair, Chris Percopo, Dolores Estrada, and Kelli Rojas. *Photo by Greg Smith.*

Leveraging Learning to
Reimagine the Future
of Philanthropy

To explore the facets of our Learn, Share, Evolve Principle, six PEAK community leaders gathered to share their perspectives on how they have seen evolution in the sector from where they sit—and what changes they most hope to see.

PEAK President and CEO **Satonya Fair** and Chief Operating Officer **Dolores Estrada** led the in-person conversation at PEAK2023 with The California Wellness Foundation Director of Grants Management **Amber Lopez**, Helmsley Charitable Trust Senior Director of Grants Management and Operations and PEAK board alum **Chris Percopo**, Rose Community Foundation Vice President, Operations and PEAK board member **Kelli Rojas**, and Resilia Senior Director of Institutional Partnerships **Anthony Simmons**. Edited highlights of their conversation follow.

Fair: What stands out for you regarding practice shifts over the past 10 years? And what growth do we still need to see in the sector?

Simmons: The answer is complex because we had a pandemic that forced folks to make changes. Ten years ago, fewer funders were having intentional conversations about equity, gender, race, and identity. The sector wasn't ready for fully wanting to understand or embrace that. Folks are also beginning to understand that you don't need all the levels of complexity that have always existed in our processes. What concerns me is the level of readiness to retreat from the improvements we saw, especially given institutions' historical risk aversion. But I'm more encouraged than not because I saw a number of folks look at their structures and realize they needed to minimize complexity.

Percopo: We built that complexity ourselves, and we convinced ourselves we needed it. And now people are challenging those norms. I hope that COVID at least showed us that we need to think more critically about how things were built, that it's okay to question how things are done, and to make things better by asking, "To what end do we have these processes?"

Rojas: Leadership needs to see that this is an equity issue and that the paperwork is weeding out really good people. We're developing relationships we didn't have before. We didn't even know that some of these organizations existed because we had created all these barriers for organizations to have access to us that we didn't realize were there until we started asking questions. Today, our grants team is the group that's advancing equity practices and asking what the unintended consequences of our actions might be. But we need to pay attention and be intentional to build structures the right way.

Lopez: The sector still needs to catch up with technology so that we're using these great tools in ways that don't just duplicate what we were doing before. You really need to interrogate the "why" behind your practices with an equity lens. At CalWellness, we have transformed our grantmaking to make it easier for the grantee over the past 10 years, partly because we have an amazing board and leadership team to support us in asking questions about every single process.

> **"Today, our grants team is the group that's advancing equity practices and asking what the unintended consequences of our actions might be. But we need to pay attention and be intentional to build structures the right way."**
>
> **—Kelli Rojas**

Simmons: Philanthropy is about 10 to 15 years behind in adopting technology. Everyone wants to be able to do their job more responsively. Technologies are there, but the sector first needs to say that it isn't getting the outcomes it wants. Technologists are out there and ready to help solve our problems.

Rojas: Often, there is not enough of the sector that's ready to move in the same direction and willing to use a given tool. If funders could talk to one another and collaborate, the sector could start moving in the same direction. And I think something that we can continue to do better in the coming years is to try to create a sector-wide movement.

Fair: We need to stay in the mental model of being in a movement. But how do you sustain these shifts over time?

Percopo: When I got into philanthropy, I was struck by how willing people were to share their experiences, to learn from each other—and the PEAK community has really done that. If we keep sharing and talking about it, it's not going to go away. We can keep driving the discussion forward.

Rojas: Another piece is internal knowledge management. We need to document what we're doing and the journey of how we got there, the process that we went through, and those we've talked to. Once we can see all those critical pieces of the puzzle, we can see how, if you take out one of those pieces, you risk regression.

Lopez: We onboarded a lot of staff during the pandemic, and we were remote, so we had to use storytelling to teach each other. We found we're really shy on documentation and onboarding processes. That's why we're trying to collaborate with different folks across the foundation who can talk about—and help document—the art, science, and philosophy behind our grantmaking and strategies. This helps to intentionally embed culture and prevent regression across the organization.

Estrada: How are you gathering information from nonprofits in ways that reduce the burden on them? And have you seen relationships with nonprofits evolve over time?

Lopez: It took years to make this change in our organization, but we ultimately said that if we've given a nonprofit a grant before and we have a relationship with them, there's no reason for us to start from scratch—to ask for the same level of documentation for the next round of funding. It might seem little, but it is a huge benefit to the grantee and our staff. And everybody loves it. Proposals are important, but sometimes perfunctory. You're able to take the time that you would have spent on them and put it into the things that really add value.

Rojas: We're collecting feedback on how we're doing as a grantmaker. This is a shift away from coming to conversations as if we have the answers, and instead showing up ready to learn what we can do better. We then figure out meaningful ways to use the information we collect. And we close our feedback loop. Even if we're not able to make a change that someone's asking for, we're able to share why we're not changing something based on what we heard. It's so important in building trust, and that has contributed to some really trusting grantee relationships for us.

Percopo: You must have trust for a relationship to be effective, and the best funders have clear, purposeful processes. I once worked with a donor who really wanted to support organizations, and their grant application was a conversation focused on what we were promising the grantee. Looking back, and now being on the funder's side, it was an impactful conversation because we were working to empower our grantees to do what they needed to do—to start the conversation in the right way and not feel beaten down because they had to do a lot of prework. Let's let them do their work and then partner with them to realize success.

Simmons: Funders need to take administrative burdens off community partners and enable them to do more of the work that they do. Funders need help with addressing their own trust issues, questioning data collection practices, collecting qualitative data, and sharing data back with nonprofits so that they can see their own growth.

Fair: If you're taking on the hard job of trying to do practice change, there's equity work that needs to come before that. When you bring people into a room they were once excluded from, you should focus on how everyone is going to work together. When people are seen and see how their contributions can further the mission, you're never getting those people out of the room again.

> **"You must have trust for a relationship to be effective, and the best funders have clear, purposeful processes."**
> **—Chris Percopo**

> **"When you bring people into a room they were once excluded from, you should focus on how everyone is going to work together."**
>
> **—Satonya Fair**

Estrada: You need to engage all roles within an institution in order to make the external relationships stronger. Focusing on relationship-building strengthens what you're doing because you position yourself to become part of the fabric within the community that you're serving.

Simmons: Let the community know that you are on this learning journey together, and that when you are attempting something different, you will engage the community before you act. That way, you can get a sense of how to customize your plans to fit their needs. And sharing that story externally means spending time being vulnerable, especially if you didn't have the positive impact you hoped to have. Progress happens at the speed of trust. When the community you serve can hear your story and see the process, you build trust. We've all seen institutions advancing a particular strategic plan or agenda and not share it with the community. It creates confusion, which makes it easier for folks in a community to retreat from you.

Percopo: If you don't intentionally try to build culture, you may end up with a culture you don't want—and undoing that culture to create what you want is a much harder lift. No one wants a toxic environment where we're going to fail, so pay attention or you're going to fall short. Especially in our sector, the culture we create for ourselves at work must be felt by the community.

Estrada: We want to leave with a little bit of hope and a little bit of promise. So, in your opinion, how do you see the sector progressing?

Rojas: The fact that philanthropy is having conversations about what it would truly look like if we were to redistribute assets gives me a lot of hope. What could that do for the community? I know that creates a strange tension, because some people see that as a challenge to our sector and to the profession. But if we all are thinking that way, we can help to move philanthropy in that direction.

> **"Let the community know that you are on this learning journey together, and that when you are attempting something different, you will engage the community before you act."**
>
> **—Anthony Simmons**

Lopez: What gives me hope is the human transformation that's taking place. Where people are learning, they're talking. They're connecting. They're questioning. And I think that these are the things that create long-term change. Ask: How can we support each other through this change? How can we support our human transformation together?

Percopo: We've spoken recently about grants management having a seat at the table. But life is a banquet and there are many tables. The challenge is not just about finding the right table, but to set the table you want for yourself. You need to keep going, because now that people are talking about these topics—some of them scary and not fun—there are conversations that have to happen.

Visit peakgrantmaking.org/learn-share-evolve to watch video highlights from this conversation and gain additional insights from the participants.

Simmons: I'm blessed to support emergent practitioners. That's what gives me hope, because institutions are composed of human beings. If you're going to change the institution, then you start by working with the people within the institution. And we all have deep structural understandings of how these institutions can either coalesce to make things bad or to make things better.

Estrada: There's so much great learning that can happen when we can be in a space to communicate and build those connections. The next generation of grants professionals is coming. They're asking these questions, and they're pushing forward, and they're wanting to understand why we do things this way. Taking a human-centered approach to what philanthropy does gives me hope.

Fair: The people who work in philanthropy give me great hope. With each of you leaning into this community, supporting each other and other institutions, we will accomplish incremental changes and long-term changes that will realize a vision of more principled grantmaking practices. ⩘

A Three-Part Strategy to Transform Grantmaking Practice

Learn, Share, Evolve

PEAK Grantmaking calls on grantmakers to design practices that promote learning and sharing of knowledge as one powerful way to contribute to the sector's collective impact.

PEAK

G R A N T M A K I N G

Increasingly, grantmaking organizations are being called upon to learn, partner, collaborate, and amplify lessons across issues, fields, and sectors. But why should organizations dedicate resources to learning—and what's important about sharing the ways in which learning contributes to their evolution?

Learning leads to evolved practices, yielding both professional and operational growth.

When we learn, we acquire new competencies and knowledge. We often think more critically, create space for innovative ideas, and solve problems more effectively on the other side of those lessons. That is why PEAK imagines a world where funders make space for learning and place a high value on sharing what they learn: Philanthropy cannot afford to remain stagnant in how it approaches communities because the conditions on the ground are constantly shifting. Philanthropic organizations invest billions of dollars each year in learning new skills, building knowledge, and gathering and analyzing data. But too often, organizations unintentionally hoard knowledge that could be used to revolutionize the sector.

PEAK calls on team and organizational leaders to intentionally create brave learning spaces, inclusive of all staff, that encourage individuals to strengthen the practice of curiosity, allow for informal and formal learning, and help build the habits of knowledge-sharing. Individuals need environments where they are comfortable learning and where that learning is valued. Organizations should aim to articulate learning objectives clearly, then design opportunities that align with those goals. In general, learning organizations will have specific tools, systems, and practices in place that continuously promote learning and knowledge-sharing. In addition, leaders of learning organizations will understand the importance of encouraging organizational growth and evolution while modeling and sharing their own learning.

However, learning doesn't just come from within philanthropy: It should involve diverse perspectives and voices from both inside and outside of your home

institution. Being an emergent learner requires (1) deliberate practices that promote learning from a diverse set of sources, and (2) knowledge dissemination that furthers sector-level impact.

When we share our successes and failures, we contribute to the sector's ability to quickly adapt and evolve.

Given grantmaking's central role in philanthropy, PEAK encourages funders to openly share practices that work to center community, reduce burdens on nonprofits, and elevate equity. In return, we promise that PEAK will support amplification of those practices broadly across the social sector.

To best support those who are most vulnerable in society, philanthropy must use its learnings to think outside the box, then share the results that will help us all quickly find a way toward solutions. As an individual or as an organization, when we share what has been learned, as well as how practices, processes, and thinking are shifting as a result, we can inspire others to do the same. When we pair learning with sharing, we create the foundation for reimagining and evolving the sector at large. That's especially important because the problems that the social sector seeks to resolve are not a one-person or one-organization job.

Structural and policy inequities have both funders and nonprofits working furiously to innovate solutions that governments across the globe—acting with publicly contributed financial resources—have failed to adequately address. Doing what we've always done and holding firm to stale practices, which are familiar and probably took years to put in place, are not reasons to stop searching for new knowledge and new ideas.

Photo on preceding page by Kenton Waltz Photography

Our Learn, Share, Evolve Principle in Brief

PEAK Grantmaking calls on grantmakers to design practices that promote learning and sharing of knowledge as one powerful way to contribute to the sector's collective impact.

Grantmaking organizations are increasingly called upon to learn, partner, collaborate, and amplify lessons across issues, fields, and sectors.

Given grantmaking's central role in philanthropy, PEAK encourages funders to openly share practices that work, reduce burdens on nonprofits, and elevate equity with a promise that we will support amplification of those practices broadly across the social sector.

Grants professionals are positioned at the nexus of philanthropic work, giving them the ability to translate data into the information and knowledge needed to improve practices, strategies, and impact.

Here are a few key questions to consider:

- What information can be unlocked from grants and knowledge management systems to improve practices, strengthen strategies, and synergize learnings?

- How can you adopt alternative methods for collecting information that align with the ways a grantee already measures impact, thereby reducing the burden of reporting?

- How does your organization demonstrate a commitment to learning with and from grantees and the grants staff working with them?

- How does your organization share your learnings both internally and externally?

- How do you collaborate with other funders to advance knowledge?

Philanthropy's evolution is essential to ensuring that this sector remains trusted, relevant, and impactful.

PEAK's Learn, Share, Evolve Principle invites grantmaking organizations to actively contribute to building sector-wide knowledge in pursuit of change and impact by sharing big ideas while also being open to the wisdom of others.

Moving the work forward requires everyone's contributions, from the most seasoned senior employee to the newest staff member. However, grants professionals are positioned at the nexus of philanthropic work, giving them a unique ability to translate data into the know-how that improves practices, strategies, and impact. As the champions for equitable grantmaking practices, grants professionals are called upon by their leaders to identify what their organizations are learning about their impact, and to bring forward innovative approaches that support the community's evolving needs. If they want to achieve greater impact, grantmaking organizations must use data and knowledge to push their grantmaking strategy. So how can philanthropic organizations and grants professionals answer this call?

PEAK aspires to influence the very practice of grantmaking, which is central to the philanthropic ecosystem. Even good or great practices and policies can be improved over time. Continuous learning, curiosity, listening to what's working for others, and borrowing unabashedly are critical for philanthropy, which is far more adaptive than corporations or government agencies.

"PEAK's Learn, Share, Evolve Principle invites grantmaking organizations to actively contribute to building sector-wide knowledge in pursuit of change and impact by sharing big ideas while also being open to the wisdom of others."

A Primer on Emergent Learning
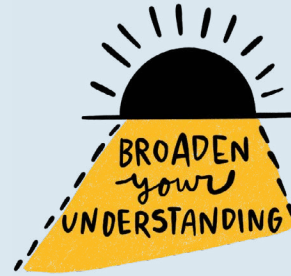
Emergent learning is a philosophy and practice that values maintaining communal spaces where people can safely learn, practice, explore, and make mistakes in the pursuit of building knowledge and skills. Unlike traditional, linear modes of learning, which favor studying a problem before executing, and strictly committing to a course of action from start to finish, emergent learning is all about adapting while executing. It moves away from discrete engagements that succeed or fail and toward a loop of testing and experimenting: learning, implementing what you learn, and testing again.

An emergent learning organization embraces learning and evolving. Sharing what you've learned and how you're evolving allows your organization to contribute to other organizations' evolution, and perhaps encourages them to embrace emergent learning. To become agile change agents, organizations need to capture and share what they learn so that the field can best adapt to community, economic, and societal shifts.

Emergent learning depends on cultures of trust, which must be cultivated to allow for safe, transparent conversations among individuals, teams, grantees, communities, and entire organizations so that knowledge, and the change it might inspire, can be easily shared and scaled. Emergent learning helps us move away from the idea, advanced by dominant culture, that learning is strictly and by necessity time-limited, formal, written down, and driven by those select few who have preset our learning destination.

Instead, emergent learning prescribes an ongoing journey in which learning is dynamic, driven by the evolving needs of the individual, the community, the organization, and the sector. It is also driven by a mindset that says that learning is iterative and that lived experience matters. This opens the door for knowledge to be sourced from different sectors, functions, and issue areas. We move from learning that focuses on the individual to learning that embraces multiple voices and sets us all on a journey to change the world authentically and effectively.

"**To become agile change agents, organizations need to capture and share what they learn so that the field can best adapt to community, economic, and societal shifts.**"
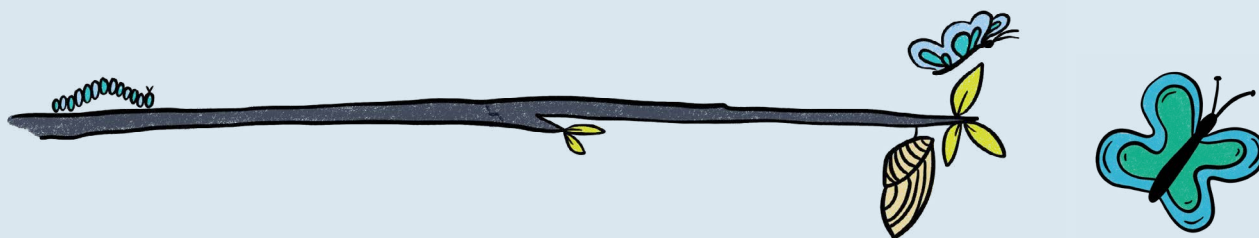
Here are the key qualities and practices of emergent learning:

- **Curiosity:** Curiosity lifts up space for constructive inquiry, allowing participants to reframe topics or issues with thoughtful questions and discussions. This provides a way to learn, plan, innovate, maximize impact, and measure success collaboratively.

- **Transparency:** Emergent learning is rooted in the free exchange of insights to create common understanding and generate discussion that analyzes issues from multiple perspectives. The sharing of all thoughts and thought processes is encouraged, as each can help to continue the dialogue.

- **Diversity:** Believing there is only one way of being and doing things is oppressive, promotes parochialism and ethnocentrism, and robs organizations of the ability to think creatively and to operate with multicultural competency. Inviting and including divergent and dissenting opinions will enrich the conversation, broaden your understanding, and help to develop even better solutions.

- **Vulnerability:** Emergent learning encourages participants to embrace the unknown, promoting a creative and dynamic work environment that embraces both experimentation and learning from mistakes. The authors of "Leading and Learning to Change: The Role of Leadership Style and Mindset in Error Learning and Organizational Change" write, "Organizations that are better equipped to turn mistakes into future opportunities and make them a part of the organizational learning process will be more adapted to the ever-changing global landscape."

- **Collaboration:** When you embrace and uplift diverse voices, you encourage participants to lead from their seats, take ownership of their contributions, and unlock the incredible power of collaborative knowledge. The collaborative nature of emergent learning ensures that an individual, organization, or community can sustain the changes it makes.

Ultimately, emergent learning creates a sector that is more trusting, effective, and efficient. It leads to more creative, constructive questions and more collaborative thinking, which can strengthen everything from strategy development to work plan creation. Adopting emergent learning encourages psychologically safer spaces that empower people to dream bigger and learn together without fear of failure or conflict. It shifts thinking and provides the time and space to evaluate and reflect with an eye towards lessons learned instead of fixed benchmarks. It also recognizes and embraces the fact that our work changes over time, and that the structures needed to do our work should therefore also change.

"Ultimately, emergent learning creates a sector that is more trusting, effective, and efficient."

By engaging grantmaking organizations in challenging our sector's strategies, practices, and underlying assumptions, the emergent learning mindset empowers us to be willing disruptors, to dismantle systemic inequities, and ultimately to transform the sector and the communities we all serve.

CAPTURE & SHARE *what we learn*

Three Action Steps

Embracing the Learn, Share, Evolve Principle requires organizations to take three actions: implement practices that promote learning, share knowledge to contribute to the sector's impact, and evolve and be a part of transforming philanthropy.

Implement practices that promote learning

There is no question that learning is important. But how can grantmaking organizations create a culture that demonstrates explicitly how much the organization values learning? And what can be done to encourage learning?

To start, organizations should establish a learning agenda, which is a set of questions and activities that help an organization learn and make decisions around learning. The process of setting a learning agenda allows an organization to work with stakeholders—both internal and external—to identify priority areas. Once established, learning agendas do two things: focus everyone involved on the knowledge that is most important to an organization's effectiveness, and help decision-makers use evidence to improve programs, policies, and practices.

Setting a learning agenda requires collaborating with stakeholders, which should be sought out both inside and outside of one's organization. Peer networks—PEAK's chapters, communities of practice, affinity groups, and caucuses—are valuable collaborators in helping determine where an organization should focus their learning. Turning to nonprofit partners and the communities they serve is especially important, as their firsthand experience will help ensure a funder's learning aligns with the issues they are seeking to address. Engaging nonprofit partners and the communities they serve is also a first step in building trusting relationships with them that also enhances the organization's overall knowledge of the nonprofit community they serve.

Remember that encouraging curiosity among your stakeholders is key to embracing emergent learning. This means that everyone must stay open to iterating as a fundamental step, which will further drive learning. To foster curiosity, avoid questions that can be answered with a yes or no. Instead, lean into "how," "why," and "what" questions. Openly encouraging stakeholders to be curious while an organization is setting a learning agenda is critical to identifying what is most important for the organization to explore and discover. Encouraging input from distinct viewpoints can help ensure that the learning agenda receives broad-based consideration and support.

Another practice that promotes learning is translating data into practical information that's ready to be used in decision-making. Data, which can be broken down into two categories—quantitative and qualitative—is raw information. It's a collection of facts or statistics that can take the form of text, observations, figures, images, numbers, graphs, or symbols. Grantmaking organizations collect significant amounts of data from nonprofits throughout the grantmaking lifecycle, deposited into grants management systems and knowledge management platforms. Yet many times, that data is not translated into information that can be used to support decision-making, let alone shared with aligned funders or with the nonprofits that provided it and the communities they serve.

What can you do to make better, data-informed decisions?

- Identify the questions from your learning agenda that require data to be answered. They will lead you to gather internally generated and externally provided data that can yield insightful information.

- Consider the types of data you're asking nonprofits to supply that might be sought by others. Can you reduce the burden on nonprofits by identifying where that data may already be publicly available?

- Collect only that data which is useful. Ask yourself whether you can turn this data into information and knowledge that helps you make decisions or improve some aspect of your work.

- Ensure data is embedded within grants and knowledge management systems.

Once you have clarity around the data you must collect, use tools that help you analyze the information and data you have. Data becomes information when it is processed, organized, or structured to provide context and meaning. Information becomes knowledge when it is compiled, processed, analyzed, and interpreted. We understand that not every grantmaking organization has the staff capacity or financial resources to make sense and find the meaning of all the data available to them,

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and we know that, within organizations, teams will use data, information, and knowledge in different ways. That's why establishing a learning agenda is so important, as is data governance—cross-departmental rules and norms around decisions regarding data, including what to collect and how to use it. Keep in mind that tools don't have to be costly: A spreadsheet with pivot tables can be the key first step in successfully analyzing what you have and learning from it.

At some point in the data collection process, organizations must consider the principles of privacy protection concerning personal data and how it should be processed—that is, ensuring it is secured appropriately and only collected for specified, explicit, and legitimate purposes. Grantmaking organizations should be transparent with their nonprofit partners about the collection, use, and sharing of data, and nonprofit partners should give implicit or explicit consent for the collection, use, disclosure, and retention of their information.

Critical to this Principle is the understanding that grantmaking organizations use the data they collect to drive change in their grantmaking practice, decision-making, strategy, and design.

When seeking to implement practices that promote learning, consider these prompts:

- How do we create intentional spaces to learn from team members?
- How do we translate raw data into practical information?
- How do we synergize learnings?
- How can we demonstrate a commitment to learning with and from nonprofit partners?
- What methods, beyond traditional reports, can we use to learn from grantees?

Share knowledge to contribute to the sector's impact

Informing peer funders, nonprofits, and the social sector more broadly can contribute to amplifying the sector's impact. When funders share knowledge productively, with an end goal in mind, they can do each of the following, and more:

- Inspire curiosity
- Improve organizational teamwork, spurring internal and external collaboration
- Advance progress on community issues
- Build rapport and relationships
- Drive organizational growth and innovation
- Help organizations become more agile and adaptable
- Support the identification of the key factors influencing positive outcomes

As we've noted, grantmaking organizations have access to extensive datasets that, when turned into useful information, can be a transformative resource for your organization and others. So what should you share?

When deciding this, consider how different stakeholder groups can benefit from what you share in distinct ways. Your nonprofit partners, for example, will benefit when you transparently share the goals and objectives behind your programs and grantmaking strategy. In this area, nothing

is too basic. Any insights into your organization will impact the way nonprofits and communities view the philanthropic sector. Sharing learning objectives—as well as the practices and ways of thinking that the organization has shifted away from—can illuminate the institution's vision for working with and supporting those at the center of its mission. Other grantmaking organizations, especially those that fund in your region or have similar priorities, may benefit from that information too, as it may impact their approach to grantmaking and decision-making.

Knowledge related to grantees—whether it's findings from evaluations and assessments or lessons a grantmaker learns about working with their nonprofit partners—can also benefit nonprofits and other funders. This can take the form of formal, scientific, or statistical knowledge, but it certainly doesn't have to: Sharing your organization's experience of something that has helped you successfully partner with nonprofits and communities is often incredibly valuable.

Consider also that public data—data that is freely available on the web—may not be easily accessible or structured in a way that makes it easy to understand or use. If your organization has spent time analyzing publicly available data and transforming it into knowledge you can use to inform your practices, share that too.

Photo by Kenton Waltz Photography

Sharing knowledge is not complicated or costly. It can be done by simply communicating what you know and what you have learned with others through informational meetings or brainstorming sessions, by writing an article for a publication or a blog, presenting at a conference, or providing training for colleagues, peers, and others. PEAK knows that not every foundation has the resources needed to publish their own white papers or blogs on lessons learned, which is why our Insights program and the *Journal* serve to amplify the wisdom of our members. It can also be done by creating a knowledge management system or releasing your own publication, which can be more resource-intensive than other methods, but has the potential to lead to organizational and possibly sector-wide transformation.

"When sharing your knowledge, be sure to do so in a way that offers others the opportunity to build on what you have shared."

When sharing your knowledge, be sure to do so in a way that offers others the opportunity to build on what you have shared. If you are sharing verbally, structure the conversation so others feel welcome to be inquisitive and to share their expertise as well. If you are sharing your knowledge in a written form, invite the reader to reach out to you if they have something they feel would be a valuable add. Recall the principles of emergent learning, and don't assume you're the only one with something to say.

Sharing what your organization knows should not be the responsibility of one person. After all, every internal stakeholder at a grantmaking organization—from your board members to your CEO to your grants manager to your program staff—has something to share with the world. The point is that anyone can, and should, share what they know and what they have learned.

While we often turn to trusted peers when seeking and sharing knowledge, PEAK challenges you to push beyond your familiar circle of peers in order to avoid the limitations that come from focusing solely on one group. Be intentional about engaging those outside your circle, and make a special effort to create spaces for engaging with nonprofit partners and community leaders. Taking this deliberate step can lead nonprofit and community leaders to share their lived experience around community needs and strategies—essential knowledge for developing sustainable solutions and practices. Gathering meaningful knowledge from nonprofit and community leaders requires time and intention, but is an important investment in building trust and partnership with the community.

When sharing knowledge to contribute to the sector's impact, consider these prompts:

- How can the act of sharing lessons learned—even when the desired outcomes have not yet been or will never be met—help improve our approach to addressing community needs?

- How can we amplify lessons across issues, fields, and sectors?

- How can we demonstrate our commitment to sharing lessons learned internally and externally?

- How do we share and amplify learnings from the work of nonprofit partners (both grantees and non-grantees) internally and externally?

Evolve and be a part of transforming philanthropy

Corporations and small businesses know that they must continuously evolve or change if they are to remain relevant and competitive. How does that translate to philanthropy? Though grantmaking organizations don't compete with one another for customers, they cannot remain relevant or achieve their full potential if they don't evolve to (a) meet the changing needs of the communities they serve, and (b) drive equity and opportunity.

Grantmaking organizations can improve their practices and strengthen their strategies by using data and information from their own grants and knowledge management systems, as well as knowledge shared by others. Once raw data has been transformed into practical information and then into knowledge, organizations should give themselves the time and space to apply what they have learned, then decide if and how they should evolve based on those learnings. Putting that knowledge to use could mean questioning practices, improving current practices, refining strategies, considering new practices, and more.

> **"Grantmaking organizations can improve their practices and strengthen their strategies by using data and information from their own grants and knowledge management systems, as well as knowledge shared by others."**

Sometimes change takes a long time to happen, and organizations—like people—can feel the need to keep gathering data to inform that change, leading to unwitting paralysis. This means that even some well-meaning philanthropic organizations have appeared unwilling or reluctant to change (quickly or at all), and grantmaking strategies and practices lag accordingly. Despite that perception, research shows that philanthropic organizations have evolved their grantmaking strategies and practices significantly over the past two decades—and not just in response to recent global and national crises—which proves that philanthropy is both willing and able to change with relative speed. The hope among nonprofits is that the changes we have all witnessed in recent years will endure and that philanthropic organizations will continue to evolve.

Evidence of continuous evolution: There is significant proof that grantmaking organizations are taking important steps to evolve and meet the unfolding needs of their nonprofit partners, the communities they serve, and the issues they are addressing.

Below are just three of many such shifts:

- **The shift from transactional connections to connected relationships.** In a transactional relationship, the parties involved focus on their own self-interests, while a relational relationship is built on the idea that the connection between parties should be mutually beneficial. In practice, this means foundation staff are centering relationships with their nonprofit partners in the grantmaking process.

- **The rise of participatory grantmaking, a practice that more deeply involves community members and other stakeholders in the grantmaking process.** Using this approach, decision-making power is given to the communities that are affected by funding decisions. Community members may help design and drive programs, set goals, make decisions about how to allocate resources, and evaluate success. This relatively new practice continues to evolve as those involved learn from their own experiences and the experiences of others.

- **Compensating nonprofit staff and community members for their time.** Grantmaking organizations have often sought input from nonprofit staff and community members to inform their foundation's grantmaking practice or strategy. While compensation hasn't been a common practice in the past, being an equity-centered grantmaker calls for an examination of all practices, including this one. Like participatory grantmaking, this recent shift in methods for valuing the intellectual capital of nonprofit staff and community members is evolving as grantmakers across the country share their experiences.

As you consider additional ways philanthropy can shift (and your role in leading those changes), revisit some of the recommendations and resources throughout the other Principles while considering these prompts:

- How can we approach organizational change courageously when we identify grantmaking practices that are misaligned with our values?

- What could it look like in our organization to rightsize the grantmaking process or implement more flexible policies and practices?

- How can we embrace risk and innovation in our grantmaking practices?

- How can we reduce the burden of grantee reporting?

- What would it look like if we aligned our reporting and evaluation needs with the ways our grantees measure impact?

PEAK Resources to Support You

Explore the Learn, Share, Evolve landing page for a continuously growing library of content, including the digital edition of the *Journal*, a downloadable copy of this action planner, and a video roundtable conversation with six grantmaking practitioners. *Visit peakgrantmaking.org/learn-share-evolve for more.*

Explore our growing collection of Insights focused on the Learn, Share, Evolve Principle. *Visit peakgrantmaking.org/insights and select Learn, Share, Evolve from the Select a Principle drop-down menu to peruse them all.*

Here are a few of our recommendations:

- **"How Surdna Centers Trust and Learns With Grantee Partners"** by Jonathan Goldberg, Surdna Foundation

- **"Packard's Personal, Ongoing 'Grantsformation'"** by Jennifer Adams, Packard Foundation

- **"How the Rogers Family Foundation Partners Beyond the Grant"** by Rhonnel Sotelo, Rogers Family Foundation

- **"How Centering Emergent Learning Can Hone Your Grantmaking and Deepen Partnerships"** by Haley Sammen, Caring for Denver Foundation

- **"Transforming Philanthropy Through Emergent Learning"** by Chantias Ford, Melanie Matthews, and Shantelice White
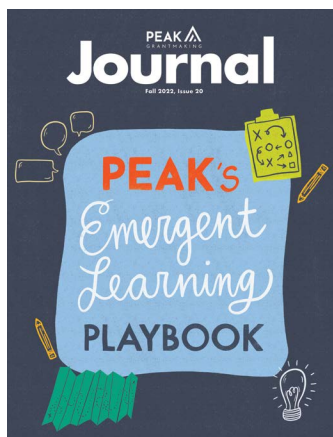
Revisit the *PEAK's Emergent Learning Playbook* issue of the *Journal,* published in 2022, which delves into the concepts and practice of emergent learning, an approach that is adaptive, inclusive, transparent, and curious. Inside, members from across our community share what being an emergent learner means to them and what it looks like in practice. We hope that it inspires you to discover some new practices in your learning journey and to join PEAK colleagues in our shared spaces. *Visit peakgrantmaking.org/journal/ peaks-emergent-learning-playbook to download the PDF or read the web-optimized version.*

Explore these sector resources:

- *Before and After 2020: How the COVID-19 Pandemic Changed Nonprofit Experiences with Funders* by Katarina Malmgren, The Center for Effective Philanthropy

- *Foundations Respond to Crisis: A Moment of Transformation?* by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy

- *Foundations Respond to Crisis: Toward Equity?* by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy

- *Foundations Respond to Crisis: Toward Greater Flexibility and Responsiveness?* by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy

- *Open for Good: Knowledge Sharing to Strengthen Grantmaking* by Foundation Center (now Candid)

Embrace the Learn, Share, Evolve Principle by taking three actions: Implement practices that promote learning, share knowledge to contribute to the sector's impact, and evolve and be a part of transforming philanthropy.

Photo by Kenton Waltz Photography

Social Justice Fund grantees gathered with Pittsburgh Foundation staff for a day of reflection and peer networking and a presentation by facilitator and principal consultant Justin Laing of Hillombo. *Photo courtesy of The Pittsburgh Foundation.*

The Journey From Transactional to Transformational Relationships

By Traci Johnson

Since joining philanthropy as a program officer, I have heard the drumbeat signaling the need to move from transactional to transformational practices—including the call for foundations to be more transparent, more engaged with the needs of organizations and the communities they serve, and more willing to share power. But I wrestled with how I could implement more equitable practices in my work. I studied resources focused on equitable grantmaking, trust-based philanthropy, participatory grantmaking, and every other framework available. And then, I had a revelation: It's all about relationships.

One definition of *relationship* is the way in which two or more concepts, objects, or people are connected; it is also the state of being connected. To me, foundations aim to make a difference in the lives and well-being of others and to create safe spaces where families and communities thrive. We cannot achieve this, much less transform the sector, without relationships with nonprofits and community members. So how can we build processes that value relationships over transactions? How can we center humanity in a field that demands tangible results?

Create a trust-based process

Coming into philanthropy at the POISE Foundation five years ago, the grantmaking process was traditional. Organizations completed a letter of inquiry or intent (LOI) as a first step. The LOI would determine whether an organization was invited to submit a full proposal. Upon invitation, a full proposal was submitted and evaluated. After the evaluation, award and declination letters were sent along with grant agreements, followed by payments. This was a basic process with no time to engage with nonprofits, do a site visit, or even give feedback. Applying what I had learned about trust-based philanthropy, I was able to move our grantee interactions from a place of compliance and control to a place of trust and collaboration.

At the time, as one person leading discretionary grantmaking at a small foundation, shifting our process was a challenge. There was extra work involved because, as the program officer, I had to build in time and opportunities to engage with applicants. In becoming a trust-based funder, I learned to lean into what we could do and not what we could not do. I had to challenge myself to be comfortable with discomfort to move towards transformational practices.

Due to financial constraints, it was not possible for us to provide multiyear general operating support. Instead, I was able to implement elements of trust-based philanthropy by reconstructing our process and timeline. For example, I eliminated the LOI and met with each applicant, which was one element that I could control. I streamlined our application process by not asking for unnecessary information while building time for office hours into the grant lifecycle. I launched applicant information sessions about our process and criteria to build transparency. I embedded continuous feedback loops and advisory committees to get input on our process and to shine a light on our weak areas, especially where it came to supporting Black-led and Black-serving nonprofits. These process shifts fostered deeper relationships with not only applicants and grantees, but also community members.

These grantee relationships were critical during the COVID-19 pandemic. POISE leadership needed to decide how to leverage its funds to support the Black community, and larger foundations were looking to us as a resource to understand the needs of Black-led and Black-serving nonprofits. Because of the strong relationships we developed before the pandemic, POISE was able to quickly learn what forms of support were needed most. This information led to the creation of the Critical Community Needs Fund, which provided general operating support grants of up to $20,000 using a simplified application process, with award decisions made weekly. POISE was able to raise nearly $2 million dollars to support nonprofits, groups, and churches across two counties. This funding not only kept the doors of these organizations open, but it kept families fed, helped children transition to virtual education, supported health and wellness checks, and kept older adults connected to the community.

Utilize a human-centered design approach

Human-centered design puts people—their wants, needs, and pain points—at the center of every phase of the process. When my current organization, The Pittsburgh Foundation, created the Social Justice Fund, it was codesigned by staff and social justice leaders who urged us to increase support for social change efforts led by those who are closest to the community issues we seek to address. These leaders were centered in every aspect of the process, from scoping out the purpose to developing criteria to determining the support type and funding areas.

This codesigned work of the Social Justice Fund did not just result in a new grant program supporting grassroots activists. It has offered the foundation an opportunity to build relationships with activists and learn about their work in the areas of disability justice, criminal justice reform, education justice, and the concept of rest for Black and

Brown people. The learnings from our grantmaking and from the advisory committee members led to a new grantmaking pillar under our strategic plan: equity and social justice.

Compensate community members for the work they do for you

It is common practice to engage community members and nonprofits in foundation-led projects that require their time and expertise, be it serving in a focus group, as a grant reviewer, on an advisory committee, or as a guest speaker. But because Black, Indigenous, and people-of-color (BIPOC) led organizations that serve BIPOC communities are disproportionately understaffed and under-resourced, they endure a greater burden when they take time to support foundation initiatives.

As staff, we are compensated for community engagement. The consultants and philanthropic advisors we engage are also compensated. But oftentimes, the contributions of our community partners—our most valuable resources— are unacknowledged or unsupported. The depth of their knowledge and life experience is immeasurable. Compensating community members recognizes them as experts who make valuable contributions like any other professional.

> **"Oftentimes, the contributions of our community partners—our most valuable resources—are unacknowledged or unsupported."**

With this in mind, The Pittsburgh Foundation developed compensation guidelines for community leaders, nonprofit organizations, and residents who help staff to advance

During the 2022 Talking With Donors 101 event, Pittsburgh Foundation's Program Officer for Healthy Children and Adults Chris Ellis gives a presentation to Small and Mighty and Social Justice Fund grantees. *Photo courtesy of The Pittsburgh Foundation.*

the foundation's mission. Because nonprofit leaders and community residents provide expertise in a variety of roles to support foundation initiatives, it became increasingly clear that compensation was required. These guidelines outline stipends and honorariums depending upon the roles and responsibilities individuals take on.

Extend support beyond grant dollars

Too often, traditional, transactional philanthropy simply supplies funding and looks for the final report in 12 months. This behavior not only creates walls between grantees and funders but also between the funder and the communities it seeks to impact. It obscures the needs of organizations beyond financial support. Organizations can struggle with data collection and evaluation, grant writing, board development, storytelling—the list goes on and on.

Several years ago, the now-current vice president of program and community engagement created More than Money at The Pittsburgh Foundation. More than Money is both a programmatic effort and an ethos that extends the foundation's support and resources to nonprofit organizations and community leaders beyond the dollars that we distribute through our annual grantmaking. It was inspired by **a 2014 keynote given by the late ambassador James Joseph** in which he called for philanthropy to use "not just conventional assets, but other forms of capital that are so easily overlooked or, at best, underutilized." He challenged philanthropy to adopt an "integrated use of social, moral, intellectual, reputational and, of course, financial (SMIRF) capital for making a community more of a community."

Through More than Money, The Pittsburgh Foundation utilizes nonfinancial capital to advance equitable practices, strengthen networks and ecosystems, amplify and drive resources to under-resourced issues and organizations, and enhance the knowledge and capabilities of nonprofit leaders. For example, we use our social capital through media and communications to spotlight the work of grantees and the communities they serve. We leverage our reputational capital to connect grantees to other funding opportunities and to aid them in expanding their networks to individuals and opportunities that can assist with advancing their missions.

More than Money has traditionally supported program initiatives intended for individual artists and grassroots organizations with budgets of $600,000 or less, and which tend to be BIPOC-led and -serving, in the areas of basic needs and arts and culture. With the launch of The Pittsburgh Foundation's new strategic plan, the aim is to integrate More than Money into all of our foundation-directed grantmaking. The ability to leverage social, moral, intellectual, reputational, and financial capital requires programmatic staff to have relationships with grantees and communities beyond what they see in grant applications.

Pittsburgh Foundation Program Officer for Healthy Children and Adults, Chris Ellis and staff lead for Small and Mighty and Social Justice Fund Jamillia Kamara Covington share ideas with grantees at last year's Talking With Donors 101 event. *Photo courtesy of The Pittsburgh Foundation.*

We must be intentional about creating safe spaces where nonprofit leaders can share their successes, challenges, and failures—and where they are valued as educators and thought partners.

Know your "why"

Beyond the difficult dance of give and take, finding common ground, and knowing when to step up and step back, the most critical element of working to center relationships is knowing your why. It is easy to try to find the newest framework to implement, or to employ a consultant to evaluate how equitable your process really is, but it all comes back to your "why."

The Program and Community Engagement department at The Pittsburgh Foundation recently did an internal exercise to determine our collective why. We developed a statement that defines why we do what we do and guides how we practice our work and how we show up in the work and community. It defines the barriers to, and what we seek to eliminate from, our grantmaking. It may seem strange to define a "why" while in the midst of the work, but it was an amazing exercise that saw 80-plus years of experience in philanthropy finding consensus around how we will show up, engage, and practice our work. Every deep relationship has a "why" to help guide people through the good times and the challenging ones. Philanthropy's relationship with communities and grantees should be no different. ⋀

Traci Johnson (she, her, hers) is the director of grantmaking at The Pittsburgh Foundation. She also cochairs the PEAK Small Foundations Affinity Group.

Evolving Requires Avoiding the Traps of Ignoring, Hoarding, and Stagnating

By Janet Camarena

As a longtime transparency champion, and a professional librarian, PEAK's Learn, Share, Evolve Principle resonates deeply with me. Since my journey into philanthropy was made through the pathway of libraries and knowledge management, I was delighted to discover the joys of PEAK, where grants professionals help their institutions make sense of the copious amounts of data they generate. Later, as a PEAK board member during the period when we were introducing the Principles for Peak Grantmaking, I was inspired by the move to help members act on these new Principles and find ways to measure philanthropy's collective progress in these efforts.

But the Principles can be elusive to manifest, operationalize, and tangibly define. One illuminating approach to intangibles like values and principles is to consider opposite behaviors as a way to understand what may be needed. So, in this case, the opposites of learning, sharing, and evolving are ignoring, hoarding, and stagnating. Sadly, to those of us who have worked in the field of philanthropy for a long time, that latter trio of descriptors might sound all too familiar. Let's look a little more closely at this study in contrasts to help change entrenched behaviors that may be holding back your grantmaking.

Learning vs. ignoring

Creating a culture of learning inside your organization has both internal and external dimensions. Starting from the inside out, you can begin by thinking about your knowledge management practices and how easy (or difficult) it is for your staff to learn from their colleagues and their body of work. Then, branch out beyond the four walls of your institution to create a culture of learning by listening, engaging with peer networks, and connecting with the communities you support.

Learning behaviors	Ignoring behaviors
• The funder has organized and centralized its knowledge so all staff know how to access, benefit from, and build on it. • The funder invests in professional development and encourages staff to participate in philanthropy-supporting organizations, regional grantmaking groups, and community engagement in order to share knowledge and learn from peers and stakeholders. • The funder invites, listens, and acts on external stakeholder feedback.	• The funder's knowledge is fragmented, staff-dependent, and usually inaccessible following staff turnover in key roles. • Staff are discouraged from taking time and resources to join professional associations or participate in courses and conferences. • The funder is inaccessible to the outside world, with very little information provided about how decisions are made, who makes the decisions, and how to engage with them.

Ways to make the shift

- Select a grants management system (GMS) that staff across the organization will find accessible and user-friendly to mine for data. And while you're at it, advance on the sharing part of this Principle by verifying that the GMS is designed for interoperability so that your data can be shared with other systems across the field.

- Build professional development goals into your staff performance review process to make this a priority. Such goals can include knowledge sharing with staff so new knowledge is imported organization wide. Performance goals for public speaking that include audiences reached can serve to advance your organization's outreach goals. In addition to PEAK, there are funder affinity groups and philanthropy support organizations for numerous fields and causes.

- Stakeholder engagement is a key element of organizational learning, so it's important for funders to create ways to collect input and knowledge from grantees and applicants. The Center for Effective Philanthropy (CEP) has a long track record of helping funders learn from grantees through its well-established **Grantee Perception Report** service. A majority of those who have collected this feedback via CEP have made changes as a result, underscoring the importance of what you can learn by listening to your grantees and applicants.

- In addition to directly surveying your grantees and applicants, go where they are talking about you and see what they have to say. **GrantAdvisor** provides an anonymous platform where nonprofit organizations can review (and sometimes vent about) funders' processes. Savvy funders go there to listen in, identify opportunities for improvement, and respond.

"Stakeholder engagement is a key element of organizational learning, so it's important for funders to create ways to collect input and knowledge from grantees and applicants."

Sharing vs. hoarding

As a sector devoted to using its considerable resources to advance the public good, it is disappointing how often the value of its knowledge goes untapped. Everything from lessons learned via programmatic efforts to demographic data about our workforce is held close to the vest rather than offered transparently in a spirit of partnership with the communities we support. This reluctance to openly share the knowledge and data that funders have access to undermines the field's ability to deliver on its mandate to advance the public good.

Given the paper-pushing history at legacy foundations, the tendency to hoard knowledge is not a surprise. After all, in the days of file cabinets and hard copies, it was not easy to identify, extract, and share knowledge with the outside world. But in today's world of digital information, social platforms, and grants and knowledge management systems, it should be much easier for institutions to access, import, and export knowledge. If philanthropic organizations understand that knowledge is a form of power, making the choice not to share it is a path that empowers the funding institution but not its partners.

Sharing behaviors	Hoarding behaviors
• The funder has a web presence it uses to communicate its work. • The funder contributes data to central repositories and data hubs. • The funder is open to using the common language of standard taxonomies to enable field-wide learning. • The funder publishes and shares what it has learned from commissioned evaluations, grant reports, and stakeholder surveys.	• The funder has no website or online presence describing its work nor the process by which it makes grants. • The funder resists using standard taxonomies to codify its work. • The funder may solicit input from stakeholders but does not communicate how that input has informed change. • After submission, grant reports are cursorily reviewed, marked as completed in a database, and filed away where no one can ever learn from them.

Ways to make the shift

• Establish a web presence to share your latest grants data in machine-readable formats and create an easy onramp for stakeholders to understand how your organization works. According to Candid, **only 10 percent of foundations have a website**, so technology and transparency are still a weakness for most institutional philanthropy. Smaller and new funders who struggle with developing a website may want to consider using their **Candid profile** as an easy way to develop a web presence. There, they can share contact information, leadership information, program priorities, and grant application processes.

• Help advance the social sector as a whole by joining the movement for more effective, equitable, and efficient demographic data collection and sharing with **Demographics via Candid**. If you're asking for demographic data, encourage your grantees to share it via their Candid profile, where multiple funders can freely access it. This unburdens nonprofits from repeated requests, while creating a collective industry standard.

• Adopt an approach to intellectual property that enables knowledge to be shared and used, either through an **open licensing policy** or blanket permission statement that allows others to distribute, adapt, and build on your material.

• Ask grantees and evaluation partners to deposit knowledge products in repositories such as **Issue Lab** and **Open Educational Resources** where they can be easily accessed by anyone.

• Leverage stakeholder surveys and listening tours as opportunities to build trust with your community by informing them what you learned from their input and what you will change as a result.

• Use Candid's **Philanthropy Classification System** (PCS) as the basis for your grants coding. The PCS describes the work of grantmakers, recipient organizations, and the philanthropic transactions between those entities. The PCS is based on the National Taxonomy of Exempt Entities and has been expanded over the last three decades based on external stakeholder input.

Evolving vs. stagnating

When thinking about change and evolution, it's important to consider both institutional and field-wide evolution. At the institutional level, do you have a shared understanding of your organization's goals and how you are measuring progress toward those goals? Did a diverse range of stakeholders have the opportunity to provide input into your plan, especially those with lived experience in the communities you serve? Of course, that's no small task to complete, but once you have such a plan in place, don't fall in love with your framework so much that you forget to think about leveraging the influence you have as a funder to take collective action that can move the field forward. For example, it's difficult to make and measure progress in a field of nonexistent or fragmented knowledge that resists taxonomies and standards in favor of singular approaches and frameworks.

Also note that when making shifts, institutions may face cultural barriers in addition to capacity barriers, and it can be unclear how to pave the way for evolution. The resources below can help you overcome these barriers.

Evolving behaviors	Stagnation behaviors
• The funder has articulated an approach to measuring its progress toward institutional goals and shares its progress and pitfalls at regular intervals.	• There is no articulated strategy guiding the funder's work, nor information about how it's tracking its progress.
• The funder's leadership is aware of its role to build the field and participates in efforts that bring together peers to "be the change."	• Representatives from the funder are rarely heard from or seen at community and industry events.
• The funder invites input from a broad range of stakeholders to ensure its strategies are evolving in ways that align with the needs of the communities it serves.	• The funder is reluctant to visibly use its power to push for advocacy and change.

Ways to make the shift

- Join professional networks and social sector standard bearers, like PEAK, to bring in best practices for motivating change.
- Use **PEAK's Principles toolkits** to elevate your work. Start by exploring how to align your practices with values—the best place to begin any culture change effort.
- Commit to ongoing improvement and transformation and use the power of your organization's position and platform to grow the movement.

The metaphor of sparking a flame is often used when referring to change. Fire needs fuel, oxygen, and heat to create that spark. And for change, you need learning, sharing, and evolving to spark the transformation. So, as you review the above study in contrasts and prescriptions for change, it's likely that you become aware of some areas of strength as well as weakness. For example, what if you're good at learning, but not sharing? Some funders may have added roles dedicated to evaluation and learning, but if there are silos that prevent that team from working with the communications team to package and share the findings, there are missed opportunities to leverage that learning for change. Similarly, you may realize you started with a values statement that includes a commitment to learning and transparency, but not really know where to begin to make it manifest. These are not overnight transformations focused on an endpoint, but a commitment to ongoing improvement and transformation. Adopting this kind of principled approach to grantmaking provides an opportunity for deep learning, engagement, and sparking that evolution toward the world we are trying to create. ⋀

Visit the online version of this article for a list of additional resources to help you encourage your organization to make meaningful shifts to embodying the Learn, Share, Evolve Principle.

Janet Camarena (she, her, hers) is director of partnerships for Candid and a former PEAK board member.

Among the many highlights of PEAK2023 was a collection of illustrations featuring members of our community reflecting on what it means to learn, share, and evolve. We've selected a few to feature in this edition.

BY CENTERING GRANTEES, USING DATA & FEEDBACK LOOPS, AND HEARING FROM STAFF WHO **DO** THIS WORK, WE GET CLARITY ABOUT WHEN to HANG onto a PROCESS & WHEN to LET GO.

JENNIFER ADAMS
PACKARD FOUNDATION

WE NEED STRONG CULTURES of LEARNING ACROSS the PHILANTHROPIC SECTOR— THE IMPACT WE MAKE is HAPPENING at the SPEED of OUR LEARNING.

ERICKA NOVOTNY,
ARCUS FOUNDATION

I'M HOPEFUL THAT GRANTS MANAGERS, RATHER THAN AN AFTER THOUGHT, WILL BE SEEN AS THE PEOPLE WHO DRIVE PRINCIPLED GRANTMAKING AND DO IT IN A COLLABORATIVE WAY THAT BRINGS ALL THE PIECES TOGETHER.

JOSH ABEL
NINA MASON PULLMAN CHARITABLE TRUST

HOW YOUR ORGANIZATION CHOOSES to be IN RELATIONSHIP with NON-PROFITS IS REFLECTED IN YOUR REPORTING PROCESS. WHAT KIND of RELATIONSHIP IS YOUR REPORTING INFORMATION EXCHANGE CULTIVATING?

RACHEL KIMBER
SMILE TRAIN

ASK: HOW COULD WE SCALE OUR SYSTEMS FOR SHARING KNOWLEDGE SO THAT WE CAN BE TRUE ALLIES to OUR PARTNERS & GRANTEES?

MELANIE MATTHEWS
CEDARMERE FOUNDATION
BRASSINGTON CONSULTING & BDO

GRANTS MANAGERS NEED to SHOW HOW THINGS CAN CHANGE in ORDER to BRIDGE the GAP BETWEEN VALUES AND REALITY

ADAM LIEBLING
CYSTIC FIBROSIS FOUNDATION

WE ARE the ONES CREATING BARRIERS FOR INVESTMENTS and RESOURCES to FLOW INTO COMMUNITIES. WE HAVE to RECOGNIZE THAT AND ACT ON IT.

TERESITA MAZ

Going Above and Beyond the Status Quo in Grantmaking

By Lita Ugarte Pardi

Let's face it: Change is hard, and both people and institutions often struggle to implement even simple shifts. But grantmaking organizations have the power to change their ways and disrupt the status quo. In the last two decades alone, we have seen an increased provision of general operating support and an openness to risk that hadn't been witnessed before. We've seen a rise in support for small, grassroots organizations and for organizations led by people who identify as Black, Indigenous, or a person of color. Though the calls for flexible and trust-centered grantmaking started long before the various 2020 crises, that's when many funders changed their grantmaking processes, and relatively quickly.

Grantmaking organizations must continue to evolve their practices and funding strategies if they are to remain relevant and achieve their full potential. They must change to meet evolving community needs and to drive equity and opportunity. Additionally, grantmaking processes and practices must evolve to be more streamlined and less burdensome, as some nonprofits are now deciding not to apply for funding if an application process is too time consuming or if reporting requirements are onerous. The world is continuously changing—community issues change and new technology emerges—and grantmaking organizations must also evolve.

"The world is continuously changing—community issues change and new technology emerges—and grantmaking organizations must also evolve."

What are the requirements and conditions for change to be sustainable?

- Support from organizational leadership
- Understanding and buy-in from internal stakeholders
- Financial resources
- Input from any external stakeholders who will be impacted
- Data that can be transformed into information and knowledge that can be used in making informed decisions
- Time to analyze data, information, and knowledge; to identify options and discuss the pros and cons; and to make decisions and plan for implementation

Grants management professionals are poised to lead change within their organizations and for the field, given that their roles are found at a critical nexus point within philanthropic institutions. Uniquely positioned between people and processes, they have access to insights about their institution's giving patterns and can help advocate for more equitable processes while identifying systemic issues that might perpetuate biases. They are the ones who connect the dots across knowledge, relationships, and systems to improve grantmaking decisions and designs.

Liberty Hill Foundation, A California Wellness Foundation grantee, works in collaboration with many community partners to support and address the intersection of LGBTQ+ and racial justice issues in Los Angeles. *Photo courtesy of Liberty Hill Foundation.*

Grants management professionals focus on ensuring their grantmaking processes include an effective vetting procedure, streamlined grantee record-keeping and monitoring, and high-quality customer service. At the same time, they are embracing the evolution of their roles and function as process specialists, data analysts, relationship experts, troubleshooters, and quality control officers.

Below are examples of how some of PEAK's member organizations have moved beyond the status quo in their grantmaking practices in recent years.

Program-related investments

Program-related investments (PRIs) allow philanthropic organizations to make low-cost capital (e.g., loans) available to nonprofit organizations or social enterprises that align with the funder's mission. The capital is typically returned to the foundation with some interest, but financial gain is never the primary purpose. Although PRIs are not a new funding strategy, more and more foundations are choosing to use some of their endowed funds to offer PRIs in addition to traditional grants.

"Although PRIs are not a new funding strategy, more and more foundations are choosing to use some of their endowed funds to offer PRIs in addition to traditional grants."

Earlier this year, the **California Wellness Foundation** invested $1.5 million in **Liberty Hill Foundation**, a progressive funder based in Los Angeles. That investment is being used to provide bridge loans to social justice nonprofits in Los Angeles that are facing ongoing financial challenges because of delays in payments on government contracts.

PRIs designed to serve as bridge loans are important because government agencies are at times running behind on making payments by two to four months and possibly even more, jeopardizing a smaller nonprofit's financial strength and resilience.

The **Gates Family Foundation** of Denver began making PRIs in 2014 as part of a mission-aligned investment strategy. In 2020, Gates used its balance sheet to guarantee a loan totaling $12.5 million from FirstBank to Colorado's three Small Business Administration-approved nonprofit lenders (Colorado Lending Source, Colorado Enterprise Fund, and Dreamspring), which allowed them to make Paycheck Protection Program (PPP) loans to thousands of small businesses across Colorado, including many minority-, women-, and veteran-owned small businesses during the COVID-19 crisis. All loans guaranteed by this PRI were fully repaid by July 2021.

A different approach to capacity building

Although it goes without saying that what nonprofit partners need most is multi-year flexible funding to support operations, philanthropic organizations can provide access to non-traditional resources that have the potential to have transformational impact. Nonprofits often need highly skilled talent to support a variety of projects, such as setting up a new database to collect data about those they serve, the services provided, and the impact of their work. Another common need is related to marketing, branding, and communications. While both examples are important areas of work, hiring a consultant can be expensive, and nonprofits may at times prioritize their unrestricted funding for more pressing needs. This is where some outside-the-box thinking can yield incredibly positive results for those involved.

> **"Nonprofits often need highly skilled talent to support a variety of projects, such as setting up a new database to collect data about those they serve, the services provided, and the impact of their work."**

The loaned executive model, in which one organization "loans" one of its staff members to another organization for a specific purpose and a predetermined period of time, was introduced in 1971 by presidential order to support the Combined Federal Campaign, the official workplace giving campaign of federal government agencies. It has since spread to the for-profit and social sectors where we see private-sector and philanthropic talent lent out to support nonprofit organizations.

At the **Rogers Family Foundation**, foundation staff—who are not a part of the program staff—share their knowledge, skills, and experience with nonprofit partners. One example is the foundation's deputy director working with a grantee to identify and analyze student outcome data to understand progress toward goals and support the grantee's advocacy campaigns. Other staff members have also provided support by writing technical copy for grantees' websites and regularly connecting grantees to new funders. These experiences strengthen the staff's connection with and understanding of the foundation's mission while allowing them to have a direct impact on a nonprofit partner's success.

Taproot and **Catchafire** are two organizations that serve as a bridge between skill-based volunteers and nonprofit partners. Both provide opportunities for nonprofits to post projects for which they need skilled expert support, and both promote the volunteer opportunities to their

Rogers Family Foundation grantee Black Teacher Project participants engage in a discussion during an inquiry group. *Photo courtesy of Black Teacher Project.*

networks, thus connecting volunteers who want to share their professional skills and expertise with nonprofits.

The **Archstone Foundation** provides access to Catchafire's platform for grantees as well as organizations that did not receive a grant, allowing them to address some of their capacity-building projects. For one declined applicant, the first 18 months of using the platform resulted in over 40 projects and calls, valued at over $160,000 in consulting expenses. Twelve months into using the platform, the declined applicant decided to apply for a grant once again, and this time they were successful in receiving support to develop a comprehensive client tracking tool. Using Catchafire's volunteer-based support, they implemented human resources and financial best practices, enhanced their web presence, and created several videos that helped tell their story.
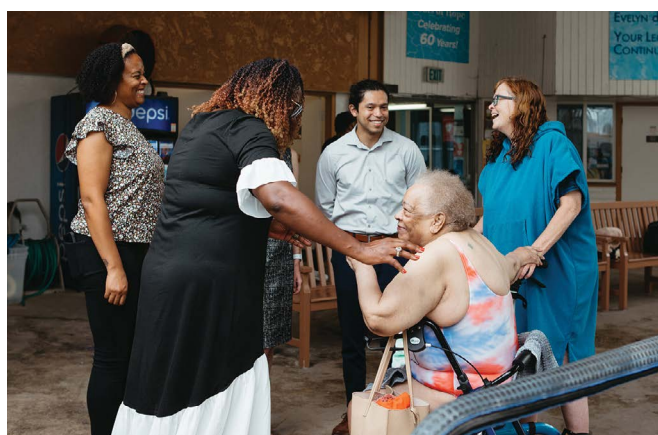
Archstone Foundation staff visits Pools of Hope, which provides physical and occupational therapy services to their therapeutic aquatic programs for older adults, as part of a capacity-building grant. *Photo courtesy of Julia Schweiss.*

Rightsizing grantmaking processes

PEAK's **Narrow the Power Gap Principle** calls on grantmakers to adopt policies and practices that cede power, generating more balanced partnerships. This is done in part by examining grantmaking processes to identify areas for improvement, including decreasing the burden on nonprofit partners by rightsizing the application process and reporting requirements.

> **"Examine grantmaking processes to identify areas for improvement, including decreasing the burden on nonprofit partners by rightsizing the application process and reporting requirements."**

One of WomenStrong International's grantee partners facilitates a session at the WomenStrong Learning Lab Retreat in Morocco. *Photo courtesy of WomenStrong International.*

In September 2017, the **Libra Foundation** hired its first executive director, an action that led them to implement practices that center grantee partners' work and expertise. During this evolution of the foundation, Libra staff streamlined processes, removed the final report requirements, and examined what labor could be shared between grantees and the Libra team. As an invitation-only funder, Libra practices trust-based approaches that facilitate relationship building with grantees, particularly through annual check-in calls. While Libra does not require end-of-year reports, they invite grantees to share optional materials that will help Libra staff learn more about their work, such as reports written for other funders.

To prioritize relationship-building and reducing the burden on grantee partners, **WomenStrong International** recently made a number of changes to its grantmaking processes after learning about their partners' preferences. Requests for formal written proposals from potential grantees have been replaced by a series of conversations with WomenStrong staff. Grantmaking staff also determined that there was no need for written reports to gather qualitative data, as program staff had so many touch points with grantees through their learning lab and capacity strengthening activities, which provide all the information the organization would have asked for in written reports. These changes are more aligned with WomenStrong's own values, as the organization makes a practice of ceding power to grantees through its trust-based funding and by taking direction from grantees on key activities. As an example, grantee partners planned and led or coled all of the sessions at WomenStrong's partner-staff convening in Morocco in September 2023.

The **Grove Foundation** believes equity is central to long-lasting change and an inclusive approach to improving lives. Like Libra, staff at Grove invest time in developing long-term partnerships with nonprofit partners, as they are an invitation-only funder. They refrain from burdening grantees with excessive document requirements and instead focus on ensuring nonprofit partners are funded and supported. Staff identify potential partners through research, recommendations from current grantee partners, and their network of equity-focused funders. When Grove transitioned to a new portal in 2018, grantees were offered—and they declined—access to the portal. That means Grove's staff enter all the information in the portal, saving their grantees countless hours.

"Be open to experimentation with some pilot grant efforts rather than thinking you need to have the process perfected first."

Implications for grants management professionals

As processes and practices evolve, so must we. At first, adjusting how you operate may not seem possible. You might ask yourself, "How can I track a PRI or the pro-bono service a nonprofit partner receives in my grants management system?" Take a step back before setting up a new system or a completely new workflow. Be open to experimentation with some pilot grant efforts rather than thinking you need to have the process perfected first. Taking the time to examine the situation at hand will benefit you in the long run. Identify possible solutions, test them, and decide on the best way to move forward. Roles might have to shift, but rather than looking at the new opportunity as a burden, think of the impact your organization can have on your nonprofit partners and communities they serve. ⋀

Lita Ugarte Pardi (she, her, ella) is the knowledge and learning director at PEAK Grantmaking.

The Community-Centered Evolution of United Way Worldwide

When **Angela Williams** stepped into the role of CEO of **United Way Worldwide** in 2021, the organization had been facing considerable headwinds that were challenging its ability to generate revenue as well as its status as a trusted intermediary between donors and communities in need. Under her tenure, the organization is taking a new approach to both listening to and learning from communities in order to inform United Way's next chapter.

In this conversation between Williams and PEAK President and CEO **Satonya Fair**, the two leaders explore the ways in which an equity-centered and community-focused approach to giving is necessary to move the field of philanthropy forward.

Fair: You have come through so many sectors and you have a wealth of experience. How has the knowledge you gained through those different disciplines impacted your approach to working at United Way Worldwide?

Williams: My approach to work has always been to go deep where I'm planted, learn the lessons well, become a subject matter expert in something that allows me to be a contributor, and then build upon those lessons for the next opportunity. I would also say that I have always led a life of service, and it started with my dad being pastor of Royal Baptist Church in Anderson, South Carolina and a chaplain in the Navy. I'd go to church, work on base, and be a great volunteer.

But the notion of being more than a volunteer in the nonprofit sector came when Hurricane Katrina happened. I had recently left as the chief compliance and ethics officer for Sears Holdings in Chicago when President Bush and President Clinton formed a foundation. They both asked me to join the staff as the interfaith liaison. I was responsible for dispersing approximately $27 million to rebuild houses of worship that were affected by Katrina.

On her visit to Maui in September 2023 in the wake of devastating wildfires, Williams met with the teams from the four Hawaiian United Ways—Maui, Aloha (Oahu), Kaua`i, and Hawaii Island—and FEMA leadership to discuss future rebuilding and strategies for rehousing displaced individuals and families. *Photo courtesy of UnitedWay Worldwide.*

Upon completion of my foundation work, I began to explore a range of opportunities, including compliance-focused work with Goldman Sachs; working in government as the chief of staff for [US Secretary of Education] Arne Duncan; then moving on to the role of general counsel of the YMCA of the USA. Throughout my career, my decisions are always weighted against what I really want out of this life and how I can best contribute as a servant leader.

Fair: When I think about my role in pushing for social change and justice, I think, I'm supposed to be doing what I'm doing right now because of my belief that God puts me where I'm supposed to be. Now here I am, in year three of my tenure at PEAK. You're in your second year as CEO, but early on, you went on a listening tour of affiliates. What did you learn from those conversations that helped you consider ways to deepen and broaden United Way's overall impact?

Williams: First, to respond to what you just shared: When I think about what led me to my current position, I would say that it's because I was, and am, in an Esther moment. There's a story in the Old Testament where Queen Esther's uncle Mordecai says to her that, "Who would know but for such a time as this, you were in the position as queen to save your people?" And when I look at what's going on in the world right now, I see parallels. I see how leading an organization such as United Way allows me to support the overall and varied needs of communities all over the world.

> **"In my first 100 days, I initiated a listening tour, because as a new leader, it's important to hear colleagues' perspectives about what's working and what's not working."**
>
> **—Angela Williams**

To return to your question: In my first 100 days, I initiated a listening tour, because as a new leader, it's important to hear colleagues' perspectives about what's working and what's not working. I wanted to know what their hopes and dreams are for the organization. Out of those conversations, three themes emerged.

The first was the need to refresh our brand while introducing the public to what United Way does. We all agreed on the need to engage younger generations with our work through volunteerism, employment, and donor engagement.

The second area of network focus is revenue diversification due to a significant decline in employee giving campaigns. The scope and focus of philanthropy is evolving across the sector, resulting in positive and negative changes in corporate and individual donations. The third was to make sure that we are impactful, relevant, and sustainable.

Fair: PEAK is also focusing on moving folks from being volunteers to being leaders. I volunteered to help with PEAK's annual conference back in 2012, became a board member in 2016, and now I'm the president and CEO. I also believe that the individuals in our network have agency, especially to advance equity. With that in mind, I want to hear more about how you are centering United Way's work around equity. How are you adapting to ensure that United Way can continue to thrive with this very specific focus on equity behind the work?

Williams: Prior to my arrival at United Way Worldwide, some great work had already started around equity. The murder of George Floyd triggered a national reaction, including that of our United Way Worldwide board of directors. They took action by creating an equity statement challenging our local United Ways to embrace equity. The goal was to introduce training around equity and to use an equity lens to look at the impact that we're having in communities. What I bring to the conversation is the lived experience of being in work environments where I may be the only, or one of a few, Black women. Across my career,

At the 2023 FEMA Asia Pacific Economic Cooperation (APEC) Summit in Seattle, Williams offered remarks on the ways women and girls are disproportionately impacted by disasters and emphasized the need for consensus-building and community-level mobilization. *Photo courtesy of United Way Worldwide.*

I've had experiences where I had to stand up for myself, to say that I should be given the chance to be promoted, to do the work, to be recognized. To step into an organization that took equity seriously and had already activated its network was an incredible opportunity.

And I modeled behavior by hiring one of the most diverse executive leadership teams in the sector. This is something I'm really proud of. It's disappointing and unfortunate that many leadership opportunities are not benefiting from the diversity of certain individual work and life experiences. Leadership at all levels, including the board of directors, should reflect the level of priority around diversity. When absent, it raises the question of whether there really is a will to lean into equity and make it a reality.

One example of how United Way is doing that work on the ground involves the Hayti community in Raleigh Durham, which is receiving funding to address the Black Wall Street travesty in Raleigh. When the city council decided to build a highway through Black Wall Street, it completely decimated generational wealth creation for African Americans because it displaced so many Black professionals. The children of those business owners are still alive and still grieve the loss of what their families had.

Our local United Way office has been facilitating racial reckoning conversations with the stakeholders. We are a part of finding meaningful ways to support the survivors,

Williams meets with students from the I Am Fantastic volunteer program in Colombia. This program teaches youth the importance of gender equality and mutual respect. *Photo courtesy of United Way Worldwide.*

United Way Ghana provides training for women so they can become economically independent and secure. More than 350 women and youth have learned craft skills in bead and soap production, baking, bookkeeping, product marketing, financial literacy, and customer service. *Photo courtesy of United Way Worldwide.*

to seek ways to recognize what happened, and to create pathways for future generations to prosper and build wealth. As a community convener, United Way invites marginalized and underrepresented people to have a voice in creating solutions for things that have happened to them and to shape the future for themselves and their family members.

Fair: That's the power of taking full advantage of community agency and the community's preexisting relationship with United Way's presence. It also reminds us that there is a history of policy decisions that purposefully disrupt our ability to be connected to each other.

It is important for us to make sure this country, and hopefully the philanthropic sector, is moving toward justice. I tell folks, "If you're a nonprofit that's not doing some level of policy advocacy, you're getting it wrong." I know it's scary—but certain policies have hurt a lot of people and need to be undone. It is beautiful to hear how you are creating that new pathway for the survivors. Reparations scare so many people, but the descendants are here, the survivors are here, and we can do better by them. But it starts first with a conversation.

> "It is important for us to make sure this country, and hopefully the philanthropic sector, is moving toward justice."
>
> **—Satonya Fair**

And United Way has a unique vantage point. You are an intermediary. You are all over the world.

I want to pivot to discuss ways funders can better center nonprofits not just as grantees, but as partners in the work. Organizations like PEAK and United Way have experience and expertise. We can do things on the ground that a funder cannot. How would you advise the funding community to embrace nonprofits as partners?

Williams: First, I'm going to start by going back to the Hayti example. United Way Raleigh was able to elevate the voices of the community and empower them to take ownership of what the Black community needs and wants.

Second, Mackenzie Scott—in her giving and in her thoughtful responses every time she published about her next round of giving—essentially says that nonprofit leaders know what their communities need, they know how to spend funds, and that she trusts these leaders will do the right thing to serve the community.

The third point I'll make is that, when we use the term nonprofit, it doesn't mean no profit. It's a gross injustice for corporate partners, foundations, or governments to believe that problems in society can be solved on the backs of nonprofits with little-to-no operating funds. That makes no sense. We see, over and over again, how communities need the services of nonprofits to fill gaps that the government or corporations, through their foundations, can't fill. In order to ensure resilient and thriving communities, all of the sectors must come together, but not at the expense of undercutting or underfunding nonprofits.

> "In order to ensure resilient and thriving communities, all of the sectors must come together, but not at the expense of undercutting or underfunding nonprofits."
>
> **—Angela Williams**

Fair: They forget that the people doing the work—sometimes in dangerous environments—are not compensated the way they could and should be, considering how tough the job is. It's also interesting how, when nonprofits are financially solid, there are funding organizations that say, "You don't need us." These nonprofits are trying to do the things that the funder said are valuable. But these organizations also have to plan into the future, deliver on a vision, have the right people in the right roles, and make sure that they are safe and cared for. That requires funding and support. It seems to be a failure of vision on the part of philanthropy to only want to fund in such narrow ways. Scarcity as practice is a mindset that must be unlearned.

With the world shifting so fast, what things are you learning, and what are you trying to unlearn as a leader?

Williams: I'm learning the importance of listening and engaging people where they are. For example, I came to support our Maui United Way and the recovery efforts around the Lahaina wildfires. The CEO of our Maui affiliate

said, "Angela, you have to be invited here and you have to make sure that you're coming in not as a savior, but to understand the importance of equity on this island." Everything they do is about honoring the Indigenous populations of the island, making sure that when philanthropists give money, that the money is equitably distributed. What's extremely critical in this reconstruction moment is making sure that the native Hawaiians have a seat at the table and a say in how their ancestral lands are redeveloped, how they will be compensated, and how to ensure that offshore corporations don't take over the land and displace the population.

> "If we're going to be part of reconstructing communities, let us go about it with humility and grace using an equity lens. And let us not repeat those practices that harmed communities."
>
> **—Satonya Fair**

Fair: If we're going to be part of reconstructing communities, let us go about it with humility and grace using an equity lens. And let us not repeat those practices that harmed communities. If the sector is going to evolve, each individual must play a role. And you, through your work, are achieving that through the volunteer community of experts and practitioners that you have cultivated—and it is a beautiful thing to observe. Like you, I value PEAK's volunteers, who will be the leaders in this sector tomorrow. I am so encouraged and excited that you are in this role. You are servant leadership in action and you are an example for us all. With love, take your flowers. ⋀

The Path to Radical Wellness: How PEAK's focus on team well-being is driving our own evolution

By Dolores Estrada
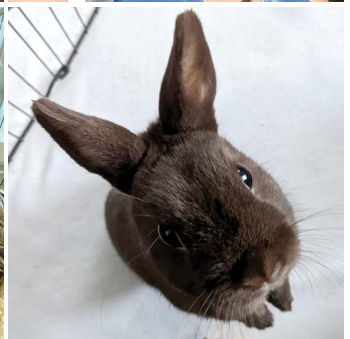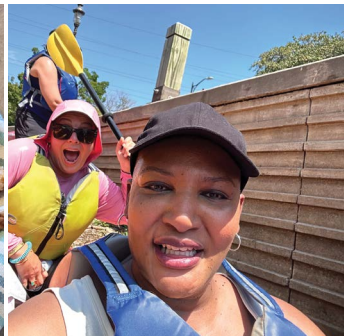
Rest and wellness are, sadly, two practices that aren't common in the workplace, especially in nonprofit organizations. We have been conditioned to believe that rest is a subversive act and wellness is a privilege for those who have resources or power. We are creatures of a culture without a pause button.

We at PEAK Grantmaking reject those norms. A recent study shared by R&R: The rest of our lives, a project of the nonprofit Social Good Fund, shows that rest and sabbaticals work for nonprofits as a tool for succession planning and a way to extend tenure, cultivate stronger boards, and increase organizational capacity. At PEAK, we have witnessed firsthand the effects of intentional rest and wellness. Our work quality has improved substantially because we are hitting the pause button, engaging in reflection, and planning proactively. This shift in mindset has enabled us to innovate and collaborate at a new level —and it shows.

This is the story of our journey to make radical rest and wellness the norm. Along the way, we've tried some new things, made some mistakes and adjusted plans, connected with folks at like-minded organizations, and had candid conversations within our team about what's working and what we can do better. We hope that our revolutionary approach to wellness will spark you and your organization to do the same.
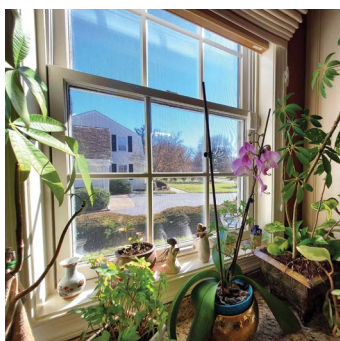
A selection of the many team shares across our Slack channels—from images of our furbabies to arts and crafts, travel adventures, retreat selfies, and more!
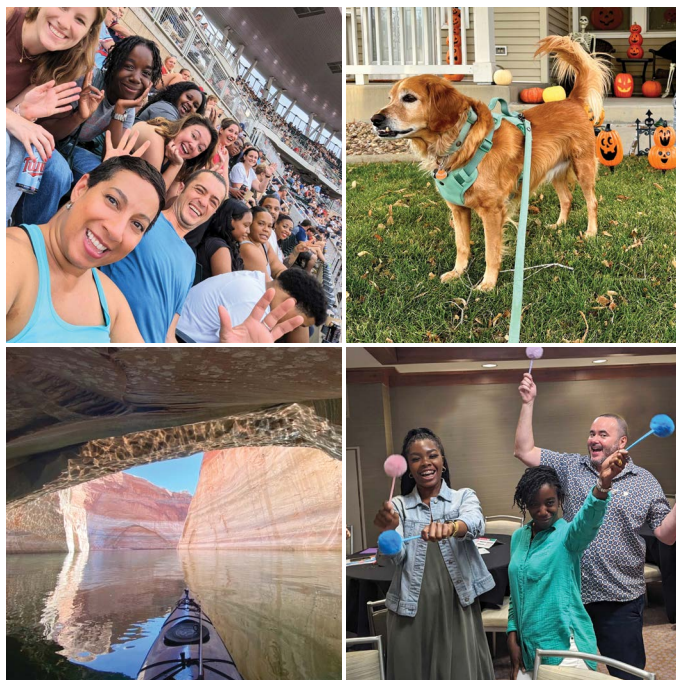
A foundation of trust and inclusion

To understand the "why" of our journey, let's go back to 2019, when PEAK launched its five Principles for Peak Grantmaking as a guide for grantmakers to implement values-driven, equity-centered practices. Internally, we wondered how we could adapt these Principles to our own organizational practices and to harness the power of the Principles for the benefit of nonprofits like ourselves. We started by reviewing our internal practices and policies and removing those elements that celebrated toxic productivity as a norm. We brought staff together to brainstorm how we might put each Principle into action and generated a "unicorn bucket"—a wellspring of highly progressive ideas and workplace practices that would make PEAK a standout in the sector. And then we began to institute changes in small, actionable steps.

But nothing from the unicorn bucket would mean anything if we didn't first build a culture of trust. When the pandemic hit, we put employee health, safety, and well-being first. We quickly pivoted to become, and have remained, a completely remote workforce, facilitated by an investment in professionalized staff and the technologies to support that shift. However, building a trusting team required tools to unlearn behaviors that value productivity over the person—tools that allowed us to create safe spaces for creativity, collaboration, and vulnerability. Furthermore, we had to accomplish this in a virtual setting.

Talent retention and recruitment required intentional support for competitive salaries, as well as professional and leadership development opportunities. It required well-written job descriptions that looked at core competencies for each role, and a hiring process and onboarding experience that would provide each new hire with the building blocks needed to be successful and feel connected with their PEAK peers. We have also been intentional and committed to developing a pathway for future growth for everyone on our team. Getting comfortable with the idea of mentoring people who will take over your job is a core tenant of our people managers, as is empowering everyone to lead from their seat.

In addition, we looked to our partners and funders for ideas, and instituted practices or policies that aligned with PEAK's values. By creating an environment where employees felt empowered, they could operationalize and sustain practices in ways that reinforce our collective priorities of rest and wellness.

Unleashing more unicorns

Our success was also contingent on resetting our concept of acceptable workplace norms to value people over what they produce. We affirmed the importance of being flexible in our new virtual workplace. We allowed employees across time zones to design their work schedules around a five-hour block of core operating hours to ensure that everyone could have a reasonable workday.

As a team, we've identified time management, priorities, and boundaries as key to working smarter and normalizing rest. We've integrated two weeklong wellness breaks into each year during the week of Memorial Day and Labor Day—our time to slow down and focus on self-care—and we also have half-day Fridays during the summer. And last June, we introduced a sabbatical policy for all staff, which provides twenty days of paid time away after completing their four-year anniversary. This April, PEAK will launch a four-day work week. We made space for people to take personal time whenever it was needed.

We also created virtual spaces to play and connect with one another. This has included weekly staff hangouts, which became a time for fun, non-work conversations, biweekly activities (Drawasaurus and qi gong movement are two of our favorites), and pop-up events like Earth Day bingo and a day at a virtual summer camp—complete with s'mores and team games, of course. We also embraced Slack as a virtual break room, with channels dedicated to showing appreciation for colleagues and their accomplishments, random sharing, gardening, and recipes. Each of these initiatives have made space for us to get to know one another as full people.

In 2022, a lull in the pandemic gave us an opportunity to build on the foundation we built in a virtual environment. We participated in our first annual staff retreat, coming together in Chicago for a week dedicated to togetherness, exploration, and fun as a team. This past summer, we retreated in Minneapolis, applying lessons learned from our first retreat to create more spaces for team learning and fun time, one-to-one conversation, and board and staff interaction.

How is this all relevant to rest and wellness? We've increased our organizational capacity to both work and to provide support for one another. And well rested individuals are able to bring their best selves and their best ideas and feel safe and successful in their work. It's about opportunity for others. A professional staff member who is cross-trained can take on an interim role during another's break while at the same time gaining practical experience for a future role. And in living by the belief that if you put people first, the work supporting our mission will get done, we've created the spaces for staff to try, succeed, or fail with love, not judgment. It's in those vulnerable moments you learn humility, learn to ask for help, or learn to offer it when you see someone drowning. That's a different workplace framing from what most of us are used to.

What are the most challenging obstacles to successfully operationalizing rest and wellness as a facet of a people-forward organization? Time, financial support, and trust. Our collective wellness is a work tool that brings us refreshed perspectives, energy, and personal satisfaction. In focusing on radical rest, PEAK has seen a radical organizational evolution in just a few years—and we hope that in sharing the impact of our rejuvenation practices, others in our community will similarly explore the possibilities. Our first lesson learned is that radical rest is not so radical at all—it's what we all deserve. ⅄

Dolores Estrada (she, her, ella) is the chief operating officer of PEAK Grantmaking. She is also a former member of PEAK's board of directors.

Participatory Grantmaking: A guide to authentic community engagement

By Vanessa Elkan

In 2020, Oregon voters passed Ballot Measure 110, decriminalizing substance use and establishing one of the largest participatory grantmaking programs in the state's history. Measure 110 is historic for taking a hard stance against the War on Drugs and for employing a participatory grantmaking strategy which will distribute over $200 million in state marijuana tax revenue collections every two years. The new law requires the state health agency to manage the fund with a community board of around 25 leaders recovering from addiction and working in the behavioral health space. Eligible grantees include community-based organizations, local governments, and the nine federally recognized Indigenous tribes who are now providing a more connected substance use and prevention treatment system of care, free-of-charge to clients. No easy task.

As a former program officer in philanthropy and policy analyst for Multnomah County, one of the state's largest behavioral health funders and providers, I was charged with tracking the fund's development for the county's Board of Commissioners and advocating for legislation that guided how Measure 110 was implemented.

The state hit some major bumps along the way—namely, in figuring out how to authentically engage communities in a participatory grantmaking program, effectively share power, and build trust. In my role, I collaborated with key community partners and state legislators in Oregon's 2023 legislative session to make improvements in how the fund will be managed going forward through the passage of HB 2513. The new policy changes we formulated will make important steps toward providing the community board with better leadership and support.

So what lessons can grants professionals take from Measure 110 to create practices that ensure communities are more authentically and strategically engaged in participatory grantmaking programs?

Build the community board with care

There is a significant amount of research and guidance available on the importance of building a board or committee that reflects the community you aim to serve. Funders should take considerable care in ensuring the group is inclusive of community experience, as well as accounting for various demographic factors, including age, disability, ethnicity, gender identity, race, and sexual orientation, knowing that their life experiences will benefit the program design and decision-making processes.

> **"Think carefully about what perspectives, experiences, and insights are needed for conversations with community members."**

Think carefully about what perspectives, experiences, and insights are needed for conversations with community members, and think beyond demographic matrices and open calls to join a participatory grantmaking board. Funders are often tempted to seek assistance from well-known community members who frequently volunteer for these kinds of efforts. Rather, find individuals who represent differing perspectives, especially those from younger generations and those who are searching for a meaningful engagement opportunity and can contribute new and important insights. A recruitment advisory committee can

be especially helpful in identifying ways to engage highly knowledgeable frontline community leaders who are best equipped to ensure transformational and long-lasting outcomes.

When considering potential participatory grantmaking committee members, funders must think carefully about the committee's composition as well as each candidate's communication style, ability to work collaboratively, and willingness to listen to others. Participatory grantmaking can be a difficult, time-consuming process, as it relies on folks feeling safe to share their perspectives, think through complex questions critically, and find consensus. Committee composition also needs to allow for a democratic and inclusive process that leaves people knowing they are making a real contribution and being heard.

Set community members up for success

At the outset, funders should understand which components of the process will be staff-led versus volunteer-led and the level of control they are willing to cede to community boards before recruitment begins. Without clearly defined and communicated roles, a disappointing and frustrating process will likely result.

Some participatory grantmaking programs involve community members in each element of a grant program's design and implementation. For others, it may be that program staff work with a smaller subset of committee members to take the lead in developing various aspects of the grantmaking process. Ultimately, it is the funder's responsibility to manage the expectations of community members and explain the realities of this work so that volunteers understand fully the training and time requirements involved.

"At the most basic level, funders can show they value community member contributions through compensation and support."

At the most basic level, funders can show they value community member contributions through compensation and support. Community members should be fairly

Though participatory grantmaking is not a one-size-fits-all practice, it is still possible to learn from the experience of others. Here are a few organizations whose work can help you map your journey.

Disability Rights Fund (DRF) supports the disability rights movement around the world by resourcing organizations of persons with disabilities to advocate for equal rights and full participation in society. Participation is embedded in their governance, grants decision-making, and staffing. DRF's intersectional model resources the leadership of people at the movement's margins, such as Indigenous peoples with disabilities, refugees with disabilities, and rural persons with disabilities. Gender transformation is a priority at DRF, recognizing the disproportionate impact of ableism and structural patriarchy on women and girls with disabilities and persons with disabilities of diverse sexual orientations, gender identities and expressions, and sex characteristics.

DRF grantee Koperative Ihumure Gikondo helps women with psychosocial disabilities in Kigali to supplement their income by creating handicrafts. *Photo courtesy of Rucha Chitnis.*

compensated for participating on committees, receiving a stipend for time spent and travel costs. Also consider the tools they might need—a laptop, tablet, or virtual platform—and whether those resources allow all participants (including individuals with disabilities) to fully participate in the process.

A high-level overview of the expected time commitment, key dates, and responsibilities for committee members should be provided when recruiting members to set expectations, ensure all members know what they will be asked to do, and confirm that they have the availability to do so in light of other obligations.

Key questions to consider:

- Where in the grant-administration and decision-making process are staff, and your organization as a whole, comfortable in letting go of power and control?

- Does staff have the capacity to dedicate significant time to listening to and acting on the perspectives of community members?

- What is the local rate for compensating volunteers for this kind of work?

- What other resources can be provided to community board members?

Develop training opportunities that minimize bias

While funders already know how to more transparently evaluate grant requests, conflicts of interests and biases, remember that community members are typically new to this role and therefore have not been briefed on how to consider their own community relationships. Consequently, funders must outline early on their tolerance for relational or familial bias and provide examples of the information that is appropriate to consider and the scenarios by which it is right to excuse oneself from a grantmaking decision. Discuss various scenarios with a community board beforehand, covering what is fair or unfair to bring into any grantmaking discussion.

"Discuss various scenarios with a community board beforehand, covering what is fair or unfair to bring into any grantmaking discussion."

Funders often equate low risk tolerance with good stewardship of resources. Out of caution, some funders may be less flexible around grant terms, overly restrictive regarding how grant dollars can be used, or exhibit bias towards particular organizations (e.g., those that are new, familiar, under-resourced, well-resourced) or requests (e.g., programmatic or general operating support). In keeping

The Walter & Elise Haas Fund leads the Learning Lab and BAY Fellows programs, recognizing that young people are leaders right now, and that they must be included in grantmaking decisions to fully address the challenges they are experiencing in accessing educational services and supports. In the early stages of the COVID-19 pandemic, the Haas Fund first engaged 100 folks, half of them youth, to recommend grants in 2020 and 2021 as part of the Learning Lab initiative. They recently expanded on this effort and piloted a paid youth fellowship for 11 Bay Area high school-aged and transitional-aged young people to award $1.5 million in general operating support grants annually to BIPOC and LGBTQ+ youth-serving organizations in the community.

Since 1974, **Haymarket People's Fund** has employed a participatory grantmaking strategy to award sustaining and urgent response grants in New England for community organizing toward systemic change. The funding panel composed of regional community organizers determines grant awards each year, awarding over $33 million dollars to grassroots organizations in rural and urban communities in the region.

Walter & Elise Haas Fund Executive Director Jamie Allison with W&EHF BAY Fellows and Skillman Foundation President's Youth Council members in Atlanta, where the youth grantmakers presented "Get Ready for Gen Z: Foundations Driven By Youth" to a national audience. October, 2023. *Photo Courtesy of Walter & Elise Haas Fund.*

A member of Radical Advocates for Cross-Cultural Education, a grantee of Haymarket People's Fund, speaks out at a rally for police-free schools. *Photo courtesy of Haymarket People's Fund.*

with **PEAK's Steward Responsively Principle**, discuss organizational risk tolerance and come to an agreement collectively on how it should influence the program's design. Providing opportunities for a committee to discuss, in depth, the "how" of grantmaking as well as various ways they can support organizations will ensure greater transparency and consistency in their grant decisions. Without these conversations, committee members—and possibly the community at large—may lose trust or question the fairness of the program overall.

Key questions to consider:

- How are committee members being informed on the various challenges faced by nonprofits and the communities they aim to serve?

- What is your organization's comfort level with committee members bringing information from outside the application into grantmaking decisions?

- How are committee members being trained to vet and assess grant requests? What grantmaking standards and policies are already being used to guide grantmaking staff that can be shared as part of committee member training?

Keep it simple!

As discussed in PEAK's action planner *Strategies for Driving Equity in Grantmaking Practice,* which supports the Drive Equity Principle, inequities in grant administration processes create a siloed, top-down power dynamic among funders, nonprofits, and the populations they aim to support. Committee members must be educated on the careful balance needed to ensure that the information requested from applicants is adequate to fully understand their grant request without exhausting the committee's own capacity for reviewing that information and making decisions. Discuss ways to limit the time required to complete the application and ways that foundation staff can take on the work of screening for eligibility, confirming tax status, or assessing financial trends for an organization. Staff must also guide members in understanding the difference between nice-to-have and need-to-have information.

Key questions to consider:

- What staff capacity is available for training and supporting community members in program design and implementation?

- How is staff educating community members on ways to narrow the power gap for nonprofits?

Build trust by committing to long-term listening

Finally, foundations need to develop processes that foster collaboration and build trust with the community, ensuring that their inclusion in the process feels authentic and not extractive. Some members may have lived experience that impacts how they show up, and that may result in them offering more questions about the process than solutions. Foundation staff must enter these discussions with humility and empathy, readying themselves for some tough conversations. Working with a community in this way takes time, and trust can only be built by providing brave spaces for authentic sharing and feedback. Without incorporating community members in the continuous design and evaluation of this effort, long-lasting trust will not form. ⋀

Key questions to consider:

- Does your staff have the capacity and time to work in the community to cocreate a participatory grantmaking program?

- How ready are staff to listen to and act on community feedback regarding programs and other ways they are working in the community?

- How long does your organization envision wanting to lead a program of this kind? Is your organization willing to invest in the launch and continuous improvement of the program long-term?

Vanessa Elkan (she, her, hers) is the senior knowledge and learning manager at PEAK Grantmaking.

Seven Stories About Reenvisioning Funder-Grantee Relationships

PEAK Grantmaking is a sharing community. Through our convenings, meetings, and online forums, we create spaces for members to share their experiences in the pursuit of reenvisioning grantmaking practices. In that spirit, we extended an open invitation to our community to share the new and innovative approaches they've taken to engaging with their grantee partners.

In the pages that follow, seven funders share stories about new ways they are intentionally collaborating with nonprofit and community partners, streamlining processes, prioritizing self-care, and how, in focusing on reciprocal learning experiences, they have strengthened relationships with nonprofits and better supported their respective missions. We hope that each of these behind-the-scenes glimpses will offer you inspiration while helping to demystify the change process, helping you to reenvision and reengineer your own grantmaking practices.

We posed three questions as inspiration: How does your organization demonstrate its commitment to learning with and from nonprofit partners and sharing that learning internally and externally? How is your organization investing in nonprofit staff and the nonprofit workforce? How does your organization turn insights from grantee reports into action?

Empowering Refugees to Respond to Crisis and Restore Hope

By Jennifer Healy

When it became clear that the millions of refugees who had fled Ukraine in the first weeks of the crisis in 2022 would not be returning anytime soon, relief organizations in the surrounding countries had to adapt. They turned their efforts from first response—offering food, shelter, and basic medical supplies—to developing long-term integration and resettlement programs. Instead of providing for daily needs alone, they began helping refugees find work or school options and attending to the psychological wounds of the traumatized. This is an ongoing and massive task, requiring sizable resources.

The United States Conference of Catholic Bishops (USCCB), through the work of its Church in Central and Eastern Europe program, has accompanied several organizations with such projects by providing financial support. Rather than viewing this aid as merely a monetary transaction, we consider it a privileged opportunity to see more clearly and learn from the expertise of those who are responding directly to the situation. The work of the Order of Malta Relief Organization (OMRO) in Riga, Latvia, is one example of why we want to learn with and from our partners.

Instead of just handing out aid, the staff of OMRO began employing Ukrainian refugees who had left everything behind. One in particular, Tetyana, was a trained

psychologist who began providing therapy to individuals and in groups. In addition to flipping the circumstances for this one professional, the therapy she provided restored hope to many like Yulia from Starobilsk in the Luhansk region: "I overcame depression, found new strength to continue living my life and set new goals for the future. After the horror of the occupation, the therapy had a healing effect on me and gave me a good start on my new life."

"Recognizing talent allowed our partner organizations to turn helplessness into usefulness and neediness into productivity."

Instead of allowing the status of *refugee* to simply mean *needy*, the leaders of OMRO gave opportunities to capable people who were ready to work. Recognizing talent allowed our partner organizations to turn helplessness into usefulness and neediness into productivity. They were able to both reduce costs—not hiring outside professional psychologists—and decrease need—providing employment and psychological support. The hope they gave to others helps the USCCB and our donors across the US know that their contributions are meaningful and genuinely helping people in a lasting way.

This is one example of many in which Ukrainian psychologists, teachers, translators, and medical personnel have become part of the solution to the crisis. The USCCB has learned with and from our partner organizations to honor the dignity of each person, whatever the circumstances, and to give people opportunities to work alongside others. ⋀

Jennifer Healy (she, her, hers) is the director for aid to the Church in Central and Eastern Europe of the United States Conference of Catholic Bishops.

Moving From Formal Reporting to Genuine Conversation

By Ines Burbulis, Breanna Byecroft, and Virginia Gentilcore

At their 2022 staff retreat, Bainum Family Foundation staff reflected on their individual, team, and organizational impacts, which led to new opportunities designed to ease the burden on grant partners. *Photo courtesy of Bainum Family Foundation.*

In an attempt to reduce some of the administrative burdens for our nonprofit partners, the **Bainum Family Foundation** recently implemented an oral reporting component for one of our Family Philanthropy sub-initiatives. Although this did result in our needing more time to turn these conversations into written reports for our review committee, we immediately reaped the benefits of making that shift. By only asking a fixed set of questions in our written reports, we were losing out on the opportunity to gain insights from our partners that went beyond what had already been shared in their initial proposals and application.

The goal was to make these oral reporting calls with field staff informal and easy-going, yielding our power and making our time together more like a conversation and less like an interrogation. We quickly began building stronger relationships, and our field partners felt more comfortable in sharing their basic needs, which allowed us to better implement our program. On one call with an organization running a preschool program for refugee children, we learned that children's vital nutritional needs are often left unexamined in favor of other critical classroom necessities. The appeal was urgent and direct: Children cannot learn when they're hungry, and global food insecurity continues to be compounded by the climate crisis.

As a foundation, we're fortunate that we were able to provide the resources to meet this basic need so that children can learn as part of the early care and education program we were funding within a refugee setting. We're working to build trust with our nonprofit partners in the field and to gain a better understanding of what is most urgently needed on the ground.

"In listening to the voices of the people closest to the work, we've opened our eyes and ears as grantmakers in ways that numerical data or words on a page never could."

Partners also shared their appreciation for this new process. They felt seen and heard while experiencing a lower administrative burden, giving them more time to do the work that matters.

In response to these findings, we've become more intentional in creating opportunities for connection, moving beyond depending as heavily on written applications and reports. We intend to continue evaluating our reporting processes through future grantmaking cycles. We want to remain nimble and adaptive in supporting community needs and partner priorities as part of our organization's core strategy. And to understand those needs, we are committed to seeking out and listening to our grant partners' stories. In listening to the voices of the people closest to the work, we've opened our eyes and ears as grantmakers in ways that numerical data or words on a page never could. ⋀

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Virginia Gentilcore (she, her, hers), is director, family philanthropy and events at Bainum Family Foundation.

The Detroit Phoenix Center, a grant partner of the McGregor Fund, hosts a summertime celebration of teen leaders. *Photo courtesy of the McGregor Fund.*

Prioritizing Learning Over Reporting

By Vanessa Samuelson

At the **McGregor Fund**, we prioritize learning with and from grant partners. Two years ago, we changed an important learning practice: our grant reports. We stopped asking for narrative reports by default and began asking grant partners if they would like to check in with us and, if so, how. Since then, almost all grant partners have enthusiastically asked for in-person or Zoom check-ins and have overwhelmingly preferred conversations over written reports.

"We stopped asking for narrative reports by default and began asking grant partners if they would like to check in with us and, if so, how."

This way of connecting has accelerated and deepened our learning through free-form conversations about what's on their minds and ours. Often, we talk less about specific programs or services and more about our interpretation of current dynamics in the fields in which we work—the funding environment, state of practice, pain points, and new and interesting ideas.

Last year, many of our grant partners wanted to talk about how and why they intentionally build trust and belonging with the communities and people they support. We learned about healing circles, governance structures that center people with lived expertise, and practices that support

individual development of self-knowledge, cultural history, and heritage. We learned about intentional hiring practices that value lived expertise and cultural alignment. We also learned that these ways of working are foundational—they aren't simply nice-to-have or optional but, in fact, are essential for effective services and programs. They also aren't often valued or resourced by public and private funding and can sometimes create tension with funding requirements.

As a private funder focused on the social safety net and its myriad programs and services, what we learned from our grant check-ins led to a series of questions that we are now asking about our own work. For example, scale and impact are often default premises in philanthropy, but what room do they leave for honoring the necessary work of creating trust, community, and belonging? What might it look like for us to move towards something that recognizes the reach, depth, and transformational power of this relational work?

These insights and questions, among others, were shared in our first-ever learning brief for staff and board members. This brief documented our learnings over the past year and the lines of inquiry that have opened up for us as a result. This year, we will prioritize learning over reporting products as we continue these conversations; follow the ideas and insights our grant partners so generously share with us; share our learning with them; and, together, consider how our collective learning can be shared more broadly. ⋏

Vanessa Samuelson (she, her, hers) is the director of learning and reporting at the McGregor Fund.

Participants gather for a group picture at The Chicago Community Trust's information session for the Supporting Exemplary Leaders & Freedom Fighters (SELFF) pilot program. *Photo by Ajani Akinade, courtesy of The Chicago Community Trust.*

Providing Women of Color Leaders an Opportunity to Heal and Lean Into Self-Care

By Elizabeth Weber

Black and Latinx communities bore the brunt of some of the worst health and economic effects of the COVID-19 pandemic, placing a heavy toll on the mental wellbeing of those trying to raise their families and put food on the table. By extension, the nonprofit leaders working on the frontlines to support these communities were suffering from burnout and fatigue—especially women of color in leadership roles who often put serving others ahead of taking care of themselves.

In response, Truth, Racial Healing and Transformation Greater Chicago—a community-driven initiative housed at **The Chicago Community Trust** that leverages community organizing towards transformational and sustainable change—is piloting the Supporting Exemplary Leaders & Freedom Fighters (SELFF) Care Sabbatical. The SELFF Care Sabbatical supports 10 women-of-color community nonprofit leaders serving the South and West sides of Chicago for one year in order to allow them to step back from their daily stresses, recharge, and pursue a self-directed path of learning, travel, observation, and reflection. Each participant receives $5,000 in unrestricted funds, becomes part of a community of

care that centers on healing and restoration, and helps to cocreate strategies that build a longer-term self-care movement. The pilot will also provide the space to develop new approaches to community service and leadership.

Throughout this transformational process, participants will be encouraged to move beyond selflessness and into self-love. The goal of the SELFF Care Sabbatical is to ensure that participants will exemplify what self-care can be when people are given the time and space to connect with their inner selves. By converting to a self-care lifestyle, the women of this inaugural cohort will help create a precedent for long-term healing and transformation that aims to have a ripple effect far beyond the initial pilot, normalizing self-care practices for communities of color. ⋀

Elizabeth Weber (she, her, hers) is the content specialist at The Chicago Community Trust.

Members of Girls for Gender Equity, a grant partner of The New York Women's Foundation, gathered in 2021 to demand that the NYC Department of Education protect cisgender and transgender girls and gender nonconforming youth from sexual harassment in schools. *Photo courtesy of Girls for Gender Equity.*

Creating Learning Communities by Connecting Grant Partners

By Catalina Calle-Duran

The New York Women's Foundation created a strategic learning hub team to increase our proximity with grantee partners during the evaluation process, strengthen the dynamism of the ways we partner and learn, and further streamline our grantmaking practices. We use the learnings facilitated through this hub to inform funding strategies, explore new ways to elevate grantees' success stories, and share data back with our grantee partners so they can use it to advance their work.

The hub gathers information by building touchpoints throughout our overall grantmaking processes. This reinforces trust-based evaluation practices as opposed to stagnant traditional reporting. Currently, the hub is developing a report for the evaluation of phase one of our program called The NYC Fund for Girls and Women of Color. We are interviewing grantee partners and gathering their insights to better understand the fund's impact in their communities, and how their work has transformed over the past seven years.

During these conversations, we have heard about the importance of facilitating a collaborative environment among community-based organizations. For our grantee partners, NYC Fund provided opportunities to share spaces for the exchange of learnings and ideas with other young women-of-color leaders, which has been instrumental in amplifying the impact of their collective efforts. In addition, building a network of leaders that represents them has been inspiring in their continuing efforts to strengthen the leadership pipeline within their own organizations. A key learning for New York Women's Foundation has been to facilitate more of these spaces, such as workshops and events, to allow more opportunities for relationship building among grantee partners.

"A key learning for New York Women's Foundation has been to facilitate more of these spaces, such as workshops and events, to allow more opportunities for relationship building among grantee partners."

Another takeaway from these interviews is the importance of flexible funding to allow our grantee partners to address the ever-changing needs of their communities. Global events, such as the COVID-19 pandemic, required organizations to quickly pivot, and many of the interviewees shared how they had to adapt their strategies to respond to the needs that their community members raised. Grantee partners noted how it was possible for them to rapidly respond because we trusted them as the experts on how to best use their funding.

Our strategic learning hub aims to share these learnings with key audiences, such as other funders, to encourage the uptake of these best practices. We are also committed to continue creating opportunities to listen to our grantee partners and elevate their insights to amplify their impact. ⋀

Catalina Calle-Duran (she, her, ella) is the manager of strategic learning at The New York Women's Foundation.

Building Collective Power with Latinx Oregonians

By Nancy Ramirez Arriaga and Taryn Sauer

Graphic recording by Drawbridge Innovations.

In summer and fall 2022, Latinx nonprofit leaders and community organizers from across Oregon gathered virtually to envision and create a just future. Participants listened to and learned from one another, sharing interconnecting values and lived experiences, culture and traditions. Together, we proactively promoted a sense of belonging.

The result was an outline for the future of Oregon that included approaches as multilayered and diverse as the diaspora: investments in reparations and returning land, communal healing, culturally affirming education, Indigenous ways of life, immigration reform, inclusion in the green economy, and so much more.

These gatherings formed part of a broader community engagement process to inform **Meyer Memorial Trust**'s developing work and grantmaking under its new mission to accelerate racial, social, and economic justice for the collective well-being of Oregon's lands and peoples.

In addition to input from Latinx leaders, Meyer also engaged Native, Asian American, Native Hawaiian and Pacific Islander communities, and gender justice advocates, as it did in 2021 with the Black community to shape its Justice Oregon for Black Lives initiative.

In partnership with trusted and respected community facilitators, we cultivated a space for Latinx community members to be in conversation with each other about their hopes and priorities and, subsequently, to share with us the extent to which they saw the community's priorities reflected in Meyer's strategic planning process.

To support a mutually beneficial process, Meyer committed to sharing the learnings, priorities, and calls to action back with the community for their own use. Meyer also dedicated funds to assemble a cohort of leaders, who had already participated in the community engagement sessions, to craft a statewide action plan for and by Latinx communities.

As the youngest ethnic group nationally and the largest Black, Indigenous, and people-of-color community within Oregon, Latinxs are projected to make up 24 percent of the state's population by 2030. Within this vibrant and growing community exists ripe opportunities for collective power building. Philanthropy has the opportunity to catalyze transformation across communities, movements, and systems as it shifts power to those on the front lines and deepens public and private sector collaborations. By leaning into the richness of *la comunidad*, participants said, it is possible to move beyond dismantling an unjust system and to begin to build momentum for cultural transformation.

Meyer Memorial Trust — Latine/x/a/o Community Engagement Sessions 2022

Visión Comunitaria
Listening & Learning from the Growing Latine/x/a/o Community's Vision

Authored by Nancy Ramirez Arriaga and Taryn Sauer with contributions by Allister Byrd, Elisa Harrigan and Mike Phillips

A detailed report outlining this vision can be found at **mmt.org/latinereport.**

Nancy Ramirez Arriaga (she, her, ella) is a former program officer at Meyer Memorial Trust.

Taryn Sauer (she, they, them) is the communications associate at Meyer Memorial Trust.

Learning as a Lever for Change

By Eusebio Díaz

A number of philanthropic organizations, in their efforts to shift the balance of power to become more inclusive of the communities they serve, have made significant changes to their grantmaking processes. Approaches such as awarding more unrestricted grants, streamlining grant applications, capturing grantee demographic data, and increasing grantmaking to Black, Indigenous, and people-of-color-led organizations have been adopted by many funders.

Others, like **Health Forward Foundation**, are also reimagining and redefining the role that learning can play in being more inclusive of the communities they serve. Learning can inform the work as much as it can tell us about the impact of the work, and it can also provide insights into the strategic priorities of our communities.

Health Forward recently adopted a new strategic plan that makes a deliberate shift to working towards racial equity and economic inclusion for the communities most affected by these issues, including Black, Latinx, and rural communities. Throughout the planning process, we intentionally engaged our communities of focus. Engaging our communities early allowed us to center the voices of those most affected by the issues and whose lived experiences informed our strategic priorities. Because these perspectives are valuable to guide the work, it was also important to us to compensate them for their expertise and insight. Health Forward staff had to shift from an evaluation mindset—where we focused on reports that assess the success of the work—to a learning mindset that values continuous iteration and the use of learnings to further refine the work in partnership with our funded partners.

> **"Engaging our communities early allowed us to center the voices of those most affected by the issues and whose lived experiences informed our strategic priorities."**

As we work to address complex issues such as economic inclusion, it has become clear that simply assessing the impact of a funded project limits our ability to understand the systems-level impact of our work and to understand change on a larger, community-wide basis. Further, reframing learning to account for systems-level impact in an inclusive manner provides an opportunity to convene

Community members came together for a Stories in Power sip-and-paint event to share what power means to them. *Photo courtesy of Health Forward Foundation.*

grantee partners into a learning community. This enables them to co-identify learning priorities and metrics, determine how these learnings inform their collective work moving forward, and just as importantly, to identify learning that is helpful to individual grantee partners in advancing their work.

Because learning can happen through various means, this approach of creating learning communities has made space for other learning methods, such as those based on the use of qualitative data. But more than that, an inclusive approach to learning can help members of a particular community reclaim their own narratives through a variety of mediums, including storytelling, art, and film. One example of how community voices have been centered is our Stories in Power project, which allowed community members to come together to share what power means to them, as well as their experiences with power in their communities. These conversations helped inform our work to address power in our communities of focus, and will continue to do so as we develop this work further.

An intentional shift to a more inclusive learning approach is not without its messiness. But the world doesn't always allow for a clean, linear process where an intervention results in a specific outcome (or doesn't). However, it's the messiness that requires us to engage more deeply with our communities—to get to the interactions and conversations that build a deeper understanding, informing the work and driving change in a complex world. ⚎

Eusebio Díaz (he, him, his) is the vice president of strategy, learning, and communications at Health Forward Foundation. He is also a member of PEAK's board of directors.

Enjoy these additional community perspectives featured at PEAK2023.

As grants management professionals, we are well positioned to promote a shared learning "culture," even between organizations that might not seem like obvious peers

JIM GALLAGHER
FORD FOUNDATION &
JUSTINE PALACIOS,
ARNOLD VENTURES

Take action on the change that you want to see happen. Everyone has different positional power but often we are the people with the authority to make a change — we just don't believe it.

KELLY HAYASHI
HEISING-SIMONS FOUNDATION
HEISING-SIMONS ACTION FUND

What do our grantees need to grow and learn so they can continually improve their effectiveness? And how can foundations support their learning journey?

JONATHAN GOLDBERG,
SURDNA FOUNDATION

We are aiming to push boundaries for how learning can drive insights, adaptations, and accountability in philanthropy.

HALEY SAMMEN
CARING FOR DENVER FOUNDATION

The more you can do as a grants manager to advocate internally for truth-based, flexible, multi-year, general-operating resources, the closer you're shifting the field to belonging.

ERIK STEGMAN,
NATIVE AMERICANS IN PHILANTHROPY

You hold so much knowledge of what are equitable and inequitable practices. Push in the areas you know you can push, and keep your eye on the areas you might meet resistance.

BRANDI HOWARD
EAST BAY COMMUNITY FOUNDATION

Innovating comes from the unexpected, from bringing disparate perspectives together, from casting a wide net.

ANN MEI CHANG
CANDID

Rafael Torres takes a selfie with members of PEAK's Latinx Caucus at PEAK2023 in Baltimore, Maryland. *Photo courtesy of Rafael Torres.*

Finding Your People:
How PEAK's peer groups create spaces of belonging and learning

By Rafael Torres

"I've found my people!" was at the forefront of my mind when attending PEAK's annual convening for the first time back in 2016. As a unique space that's mostly tailored to the grants management function, this is a common saying for PEAK's members and convening attendees. In those less virtual days, many of us who traveled to the convening to be with hard-to-find peers discovered a home away from home. There was no school or official training for grants managers who may have fallen into this line of work. It was the philanthropy-supporting organizations like the Council on Foundations, Grantmakers for Effective Organizations, and PEAK that carved out a space for learning, sharing and evolving by creating a sense of belonging for all grantmaking professionals.

At the start of my career, I found that making connections with other grantmakers was crucial to my growth. PEAK membership offered me regional chapter meetups for networking and professional development, and CONNECT, an invaluable virtual forum that did indeed connect me with peers across the nation.

But the need for connection isn't limited to professional needs. When I first started in this field, it was no surprise that I could not find much diversity among funding institution staff. Philanthropy is a privileged space. Like many of my peers, I've long yearned for a sense of belonging as a Latinx Puerto Rican. Of particular interest to me were PEAK's caucuses. These are safe spaces that foster a sense

of connection with peers of shared cultural identities for professionals who might otherwise feel they don't belong in the field of philanthropy.

Since PEAK launched its caucuses in 2021 along with our affinity groups and communities of practice, there is now a wide range of spaces that provide opportunities for like-minded peers to intentionally and meaningfully connect within the philanthropic sector and PEAK's network. Through these groups, we are building transformational relationships to advance our careers and drive change in philanthropy.

As PEAK's peer group specialist, the value of these spaces shines when participants approach me after a session and say, "Thank you. I needed this." For such a long time they have wanted to see and hear from others like themselves and, most of all, to feel seen and understood. These spaces offer tailored professional development, including networking, opportunities to connect with allies, and mentoring. Emerging and new grantmakers want to know how seasoned professionals found success, what they learned along the way, and how they found the path to thrive as they navigated spaces that don't always feel welcoming. Many of PEAK's peer groups are exploring and embracing professional wellness to help participants stay healthy, avoid burnout, and continue building a career in a sector they might otherwise leave.

Peer groups are led by volunteers who help to develop programming that builds and expands group participation. Much of a group's success is due to its cochairs, who have shared with me what their experiences in these groups mean for them *(see sidebar)*.

PEAK has always deeply valued its member-driven spaces, and it's been exciting to see these groups thrive—either through CONNECT discussions or virtual events where members can network, learn, and share with one another in ways that lay a strong foundation for evolving the sector. ⋀

*Visit **peakgrantmaking.org/peer-groups** to learn more about PEAK's peer groups and how to join.*

Rafael Torres (he, him, his) is the peer group specialist at PEAK Grantmaking.

"I wanted a community and a safe space for us to talk about the challenges we face. It was so important for me to have a platform where Black people could show up and be themselves unapologetically. I felt joy when I started talking with the group. They understood me and I didn't need to explain myself. The Black Caucus represents this forum where Black professionals can connect, and I hope it will stay that way in the future."

Edberte Beauzile, Consultant, and former PEAK Black Caucus Cochair

"The Latinx Caucus provides a sense of belonging and the knowledge that we're in a safe space where we can have some understanding of where we're all coming from and the challenges and experiences that we've all likely faced. Having that sense of belonging and being able to build upon that in philanthropy is amazing."

Rachel Gonzales, Senior Grants Management Associate, Walton Family Foundation, and PEAK Latinx Caucus Cochair

"Intermediaries don't really fit neatly into different PSO or infrastructure groups, which is a bummer because so many of us crave peer-to-peer learning… It creates a real connection with peers, which also shows up when the same people pop up in other forums."

Jen Bokoff, Director of Development, Disability Rights Fund, and PEAK Intermediaries Affinity Group Cochair

Dreaming Big:
How philanthropy could harness data automation to drive equity

By C. Davis Fischer

PEAK Partnerships Director C. Davis Fischer (top right) and consultant Kyle Renninger (center) shared tips and tools to better leverage technology to drive equity and efficiency at PEAK Pacific Northwest's chapter reunion in October 2023. *Photos by Kenton Waltz Photography.*

Institutional philanthropy tends to operate with opacity and autonomy as it relates to the application and reporting process. As the saying goes, if you know one foundation, you know one foundation. For the 1.48 million registered 501(c)(3) charitable organizations in the US social sector, almost 1.3 million have a budget of less than $500,000, with almost 79 percent having budgets less than $50,000. While many of these nonprofits are meeting immediate and vital needs in their communities, the vast majority self-report not receiving philanthropic funding from institutions, effectively operating under the blanket of anonymity when it comes to funders. The question remains: Why?

While there are a myriad of reasons, one glaring issue is that many of those smaller organizations, despite their good work, can not provide services to their community while also successfully navigating the funding application game, often due to a lack of staffing resources. It takes huge amounts of time to track down prospects and manage the application gauntlet and subsequent reporting requirements. There are, however, potential solutions, which include harnessing technology and data automation to both streamline and shift how nonprofits interact with and experience institutional philanthropy.

But this isn't a conversation simply about efficiency. This is squarely about equity. By focusing on grants management systems (GMS) as complex technologies developed to help us streamline and better manage the grants administration process, the sector could make considerable strides in building efficiency and equity with technology.

In 2023, most of the information funders sought and needed to determine a nonprofit's eligibility and viability as a grantee was available online. These organizations have profiles on **Candid**, have likely completed dozens of past applications, are rated on **Charity Navigator**, and may have their impact metrics documented on the **Impact Genome Project**. If the information is already available, why do funders keep asking nonprofits to provide the same information time and time again? How could funders leverage existing data sources to streamline this whole process?

If grants management systems built deeper integrations with existing data repositories, philanthropy could go a long way in reducing burdens on nonprofit partners while also helping to gather a more standardized set of information about the field as a whole. There are many emerging examples of this coming online every day. Whether it's Giving Data leveraging **Candid's free Demographics API**, or **ImagineCRM**'s Candid connector in Salesforce pulling Charity Check information with links to specific audited financials and 990s, the examples of this type of technological solution are growing.

However, too often these integrations are special add-ons or custom solutions GMS vendors develop when requested by a foundation. Philanthropy would gain momentum in building equity into this technology by making it standard practice to use these integrations. This shift would mean that a small nonprofit only has to manage their profiles and information in a few repositories, and that information would then automatically feed into all of their institutional fundraising efforts.

Perhaps a bigger win is that if that same small nonprofit was curating their online presence in these more centralized repositories, they would inherently become more visible to a wider audience, increasing their chances of attracting funding from new and unexpected sources. For example, all the fundraising campaigns you see on Facebook are leveraging Candid's data. Candid is delivering nonprofit data files to Facebook to allow hundreds of thousands of nonprofits to fundraise. Similarly, donor-advised funds in community foundations and financial institutions often pull from central repositories to help guide their donors to worthy recipients of the causes they care about.

So many of philanthropy's technological evolutions of the last 20 years have focused on building efficiencies for foundations, often at the expense of nonprofits. Yet the promise remains: Philanthropy could work so much better if the end point was technology in service of equity. That would mean recalibrating for the needs of the field as a whole, rather than the needs of one foundation. Our sector needs to evolve to meet the demands of our time, and data is a critical component in mapping the activity of over 1.8 million organizations. Philanthropy needs to invest in the communal view, even at the expense of foundations' desire for bespoke information.

"Our sector needs to evolve to meet the demands of our time, and data is a critical component in mapping the activity of over 1.8 million organizations."

Just imagine how different things could have been in 2020 if we knew how to find organizations on the ground floor that were serving as the social safety net. Instead of relying on shadow spreadsheets and informal networks to identify organizations worthy of support, funders would be well served to invest in centralizing the collection of data and moving beyond two-year-old tax forms as the go-to for understanding who is doing what and where. Just imagine if, in the panic of that time, grantmakers could have been a few clicks away from finding the very community organization that was providing meals for families dependent on school lunches and desperately in need of financial support.

Too often, philanthropy errs on the side of complexity. Technology is poised to help us make life easier for ourselves and for our grantees, but we have to want to use it that way. ⋀

C. Davis Fischer (she, her, hers) is the partnerships director at PEAK Grantmaking.

The leaders of the Environmental Justice Resourcing Collective gather for a retreat in 2022. *Photo by Yarilou and Danciel Rivera, courtesy of Kataly Foundation.*

Using Oral Reporting to Cultivate Trust, Care, and Possibility

By Danielle Royston-Lopez

Increasingly, funders are exploring and implementing alternatives to traditional narrative reporting in an effort to operationalize trust-based, relationship-centered values. Working groups and program staff are gravitating towards reduced reporting requirements to minimize administrative burdens on grantee organizations, swapping narrative reports altogether for conversational check-ins with grantees, and welcoming the reuse of reports generated for other funders to gather insights.

But many of the popular alternatives to narrative reporting come with weighty considerations about measuring impact, setting expectations, and deepening accountability. While the intention behind this shift in reporting may be to reduce burdens on grantees, philanthropy may end up replicating some of the same burdens it intends to eliminate if it isn't considering execution carefully.

The Kataly Foundation is a family foundation that was founded in 2018 with the goal of spending out within 10 to 15 years. Our mission as a foundation is to redistribute resources to support the economic, political, and cultural power of Black and Indigenous communities, as well as all communities of color. Kataly has three program areas: the Environmental Justice Resourcing Collective, the Mindfulness and Healing Justice program, and the Restorative Economies Fund. Each program area is distinct, but all share a commitment to redistributing wealth towards power-building work so that communities have the resources, power, and agency to execute their own visions for justice, well-being, and shared prosperity.

"One component of being accountable to the organizations we resource involves designing an effective and equitable reporting process."

At Kataly, one of our values is accountability, which includes accountability to our grantee partners. One component of being accountable to the organizations we resource involves designing an effective and equitable reporting process. When we took a step back to examine the existing system, we saw how the typical written reporting process was symptomatic of the problematic power dynamics that many grants administrators find themselves in. We had to ask ourselves: "Who does reporting actually benefit?" This is, in many ways, an existential question that calls out the viability of current, burdensome grantmaking processes, while calling in the people who are tasked with upholding them—that is, my colleagues and peers in grants administration.

In addition, grants management teams must ask, "What do we do with all the data we gather from hundreds of reports or conversations?" and, "Who is served by foundations sitting atop a mountain of ill-used data?"

At Kataly, our grants management team has worked closely with each of our programs teams to arrive at a shared understanding of what a successful grantee check-in looks like. In designing the components of our grantmaking, we knew from the outset that we wanted to implement a process that

- is rooted in relationships that center the self-determination of communities;

- prioritizes responsive care and flexibility for grantees;

- comes from a place of possibility and trust;

- is asset-based, accessible, and appropriate to the unique realities of each grantee; and

- fosters the extension of trust internally to our team at Kataly.

In each step of the grantmaking process at Kataly, fostering relationships that center the self-determination of communities was key—as was having conversations with grantees that were not the oral version of a written narrative report. In collaboration with our programs teams, our grants management team unpacked what is most meaningful about an annual check-in for grantees: letting them know beforehand the key questions we want to explore, setting the expectation that check-ins will last a maximum of 20 to 30 minutes, ensuring that they are provided opportunities to engage with us in worthwhile ways. We then commit to responding to what we receive in a timely and meaningful way.

Along the way, the Kataly team has learned that, while we can set expectations, grantees sometimes want to talk through what's top-of-mind for them for longer than a half-hour check-in, requiring us to exercise flexibility in our schedules in order to be as present as possible.

The Kataly Foundation team at a 2022 retreat. *Photo by Bethanie Hines, courtesy of Kataly Foundation.*

Across each of Kataly's three program areas, in addition to asking about relevant updates on the work, we ask about an organization's annual budget and any emerging needs within the organization and across the field. We ask about the annual budget because, as a spend-out foundation, we want to understand the budget trends for an organization year-over-year so we can best anticipate and cocreate the right-sized support to sustain grantees' operations long after Kataly sunsets. Asking about emerging needs in the field is a way to center the expertise of grantees. It's also a way for funders to learn necessary context for navigating the ecosystems we seek to support with sensitivity to both the pain points and the possibilities.

"Collecting qualitative as well as quantitative data presents the opportunity to synthesize findings in a way that surfaces nuanced learnings."

Although reviewing a high volume of insights from these conversations can feel overwhelming, this is also the time when we get to turn insights into actions. Collecting qualitative as well as quantitative data presents the opportunity to synthesize findings in a way that surfaces nuanced learnings. For example, in the early stages of the 2021 inflation surge, our team learned through our conversations that grantees were feeling challenged to make their hard-earned dollars stretch to meet the basic needs of their staff and community. We synthesized the qualitative data from conversations with 53 grantees in the summer of 2022, and that helped us confirm a trend about the strain of inflation. Organizations with smaller budgets shared that staff were facing financial and quality-of-life challenges while trying to run programs to support their communities. This is why, in February of 2023, Kataly awarded 135 organizations with a one-time, unrestricted $50,000 fortification award, encouraging recipients to utilize the funds to meet the quality-of-life needs of their teams.

In a time of ongoing pandemic, economic uncertainty, climate crises, racial reckoning, and backlash against bodily autonomy, movement leaders are navigating a constantly changing landscape. Their capacity needs are evolving, as are the needs and dreams of the communities they are in committed partnerships with. Consequently, asking a grantee "What do you need?" powerfully positions movement leaders to invite funders into a relationship of deeper solidarity. As funders, it's imperative that we ask ourselves what it means to be prepared with adequate bandwidth and resources already in place to respond in a way that is as timely and effective as possible.

"Asking a grantee 'What do you need?' powerfully positions movement leaders to invite funders into a relationship of deeper solidarity."

At Kataly, grants management and programs teams strive for consistent and clear communication, utilizing a working knowledge of each program portfolio, as well as knowledge across portfolios, to foster rapid and effective collaboration. This requires us to reciprocate trust across the organization, knowing that we are all coming from a place of wanting to work together to best honor the needs and goals uplifted by grantees. When we are able to extend this trust internally, grantees and communities feel the ripple effect, creating the potential for more genuine relationships with Kataly.

The question of how to measure impact when utilizing a qualitative, relationship-centered reporting format comes up often in wider conversations around trust-based philanthropic practices. I believe Kataly's impact is measured by the ways in which our grantee partners thrive. This means understanding that most of the story we participate in with grantee organizations and communities is not actually ours to tell. While Kataly is consistently poised to meet the challenges grantees face, the real story of impact comes from the successes that transpire as a result of our willingness to follow insights with actions. It's essential that communities and movement groups have control over the narrative of their own impact, rather than funders centering themselves in the story. When we sit down with a grantee partner who shares their wins, the opportunity to celebrate with them in that moment is deeply human, authentic, and immeasurable. ⋀

Danielle Royston-Lopez (she, her, hers) is the grants and program associate at Kataly Foundation.

United Way of Greater Atlanta and its partners engage residents and local leaders in the innovation and redesign process of a neighborhood to implement best practices in education, income, education, health, and housing. *Photo courtesy of United Way of Greater Atlanta.*

How a Community Foundation and a United Way Adopted Principled Grantmaking Practices for Greater Impact

By Lita Ugarte Pardi

Did you know that there are more than 1,000 community foundations and 1,800 United Way affiliates in the US alone? Chances are you have personally engaged with at least one of these organizations, and perhaps your home institution has partnered with one in the past. The growth and evolution of these two organizational structures is significant, especially when one considers the level of community support they provide and the philanthropic capital that flows through each. It's important to note that these organizations all operate independently but, in recent years, community foundations and United Ways across the country have been exploring more collaborative ways of operating to better meet the tremendous needs in communities.

Here, we highlight two stories of evolution—at **United Way of Greater Atlanta** and **Pinellas Community Foundation**—that we hope will inspire change, both inside your organization and through partnership with locally-grounded organizations.

United Way of Greater Atlanta (UWGA) was founded in 1905 and for many years focused on partnering with corporations in their workplace giving campaigns to raise funds to address community needs. UWGA's child well-being index, developed in 2017, collects data on 16 measures related to factors that help account for the wide disparity in child well-being in the Atlanta region. Measures are tracked and analyzed by race and zip code, which means UWGA now has real-time data pointing to where conditions are improving or worsening and where funding is most needed. United Way developed the Child Well-Being Index as a diagnostic tool to tell them where each neighborhood stands in their progress toward saying, "all the children are well." They use index insights as a compass to collectively—with nonprofit, business, philanthropic, and government partners—direct resources in ways that can most powerfully improve lives. Given the tremendous needs across their service area, it became clear they couldn't go it alone. UWGA's staff was just putting their plans in motion when the events of 2020 put them on a fast track to operationalize partnerships with government and philanthropic partners in new ways.

"Since 2020, UWGA has established partnerships with 10 public sector partners and been a part of 5 funder collaboratives, putting them in the driver's seat for the allocation of more than $75 million."

A partnership with the Community Foundation for Greater Atlanta to administer the region's philanthropic response to the COVID-19 pandemic in 2020 provided UWGA an opportunity to test a new grants management system and different ways of working internally by fully empowering grantmaking staff with expertise to make funding recommendations. Later that same year, the launch of their United for Racial Equity and Healing Fund served as a safe learning space for UWGA to center racial equity in its grantmaking and learn about how they could apply a racial equity lens across their grantmaking, something UWGA had never done. The philanthropic capital raised specifically for the effort funded Black-, Indigenous-, and people-of-color-led organizations in metro Atlanta that support power-building and community organizing for racial equity and healing, an area UWGA had never before funded given their focus on human services. This fund provided UWGA another opportunity to test and further refine their new approach to grantmaking and to demonstrate to nonprofits, the community, government agencies, and philanthropic organizations that they were no longer the same United Way everyone had known for decades.

These two grantmaking efforts opened UWGA up to be a partner of choice for numerous state and local government agencies. The new partnerships have given them the

During the pandemic, United Way of Greater Atlanta, nonprofits, and corporations collaborated to get much-needed emergency and financial assistance to children and families across Greater Atlanta's 13-county region. *Photo courtesy of United Way of Greater Atlanta.*

opportunity to showcase the depth of their content knowledge and extensive experience in grantmaking and grants management. Many of the partners were brought in by relationships UWGA staff have in the community, while others were initiated by external entities that had witnessed UWGA's evolution. Since 2020, UWGA has established partnerships with 10 public sector partners and been a part of 5 funder collaboratives, putting them in the driver's seat for the allocation of more than $75 million.

Founded in 1969, Pinellas Community Foundation (PCF) was established to bridge the gap in the availability of social services to the Black community that stem from Florida's history of segregation. Donors establish donor-advised funds and recommend grants out of those funds, and there is a modest discretionary pool of funds managed by the foundation's board and staff. Given their focus on geographic communities at the city, county, region, and state levels, community foundations have a history of connecting with local elected officials and government leaders to ensure there is a certain level of familiarity with the work of the foundation. Relationships with county commissioners and leaders of government agencies played a big role in PCF stepping outside the role it had traditionally played in the communities surrounding Clearwater and St. Petersburg.

PCF's recent evolution stemmed from the federal government's investment in communities due to the COVID-19 pandemic. In July 2020, Pinellas County received $180 million from the Coronavirus Aid, Relief, and Economic Security (CARES) Act, which had to be spent by the end of the year. The county wanted to allocate a portion of that funding to food, behavioral health services, and legal aid to prevent residents from being evicted. Given the speed at which they needed to move, and knowing that PCF had deep relationships within the community, the county turned to the community foundation. PCF quickly moved forward, motivated by the opportunity to impact their community at a scale they'd never had the chance to previously.

Over the course of four months, PCF awarded $18 million to nearly 70 organizations, a process that required the organization to rapidly grow its grantmaking staff from a single grants manager to a team of four. Developing processes and systems to administer such a sum was a next-level effort that required speed and agility to refine internal communication norms. Project management tools have supported the team as they developed processes and learned how to work most effectively as a team. Since that first CARES Act funding partnership, PCF has engaged in at least three more partnerships with local government agencies. Though PCF staff don't drive the funding recommendations, their role as administrators and their ability to support nonprofit partners has resulted in more than $25 million flowing to community-based organizations, with investments ranging from support for major capital projects to the establishment of mental health hubs. This would not have been successful without PCF's engagement.

Embedding equitable practices in government-funded grantmaking efforts

Both UWGA and PCF implemented equitable grantmaking practices from PEAK's Principles prior to launching these partnerships, including building the capacity of nonprofit partners, investing in small and grassroots organizations, and awarding multiyear operating grants when possible. Both organizations share these Principles-based practices with potential philanthropic partners and talk through the opportunities to align the project with our Principles before beginning to administer funds. Though both organizations must consult with their partners on grantmaking parameters, through conversation and negotiation, they have both been able to imbue their grantmaking processes with equitable practices.

Support beyond the check. Both organizations also offer support beyond the check, which has been impactful. Responsive, adaptive, non-monetary support bolsters leadership, capacity, and organizational health. UWGA has partnered with Network for Good for several years and is now also working with Resilia to make their programming available to nonprofit partners. Investing in these capacity building resources, they have introduced their government partners to the idea that funders should provide support beyond the financial transaction of a grant or contract.

Narrowing the power gap. Another way to build nonprofit capacity is to partner with each nonprofit as they prepare their grant application and, once they become a grantee, to support them in navigating systems and processes. PCF worked with nonprofits to address areas where their applications could be strengthened or identify invoice issues that would hold up a reimbursement.

"Another way to build nonprofit capacity is to partner with each nonprofits as they prepare their grant application and, once they become a grantee, to support them in navigating systems and processes."

Government contracts typically operate on a reimbursement basis, making it challenging for some nonprofits—especially smaller ones—to successfully scale any efforts given cash flow constraints. PCF's commitment to ensuring small nonprofit organizations had access to CARES Act funding led to the establishment of a working capital loan fund with a private foundation through which nonprofits that received CARES Act funding could get an interest-free, default-proof loan. This allowed grantees to spend money to do the work, be reimbursed for their expenses, and then pay back the loan. This creative approach yielded no loan defaults and a loan fund that is still active today.

Evolving grant reports. While PCF's staff would have liked to trim down the application, they persisted in looking for ways to eliminate unnecessary steps. When one of their partners did not mention the need for written reports, PCF staff proceeded with oral reporting. To ensure PCF gathered the data points they knew were needed, PCF staff met one-on-one with grantees and reviewed the proposed outcomes from the application to identify the questions they'd discuss when they next met. Staff captured what the grantee did and invited them to edit the report before submitting it to their partner.

Pinellas Community Foundation grantee Shihan School of Survival teaches karate to kids to improve self-esteem and self-discipline. *Photo courtesy of Pinellas Community Foundation.*

Rhythm Changes, a Pinellas Community Foundation grantee, was funded through the CARES Act to host drum circle therapy sessions to improve mental health outcomes. *Photo courtesy of Pinellas Community Foundation.*

Emergent learning in action

Emergent learning is a philosophy and practice that values maintaining communal spaces where people and organizations can learn, implement what they've learned, explore, and make mistakes, continuing to iterate as needed. To successfully embody this practice, individuals and organizations must shift their mindset and approaches to each situation. Essential qualities of the emergent learning philosophy are curiosity, transparency, diversity, vulnerability, and collaboration. Being an emergent learner requires intention and yields many positive outcomes when done well. Both UWGA and PCF staff shared how embracing qualities of emergent learning have resulted in enhanced relationships with their nonprofit partners. Here are a few of their key takeaways.

> **"Both UWGA and PCF staff shared how embracing qualities of emergent learning have resulted in enhanced relationships with their nonprofit partners."**

Having clear expectations and effective communications channels with government partners has been critical. When launching a new grant partnership, understanding what the partner expects, and negotiating those expectations, set the stage for a smooth relationship. UWGA found it important to allocate time before launching a process to agree to the data points that were needed to justify grant decisions, as that would keep staff from having to scramble at the last minute when requests for additional specificity came in.

Equally important is having clarity on the chain of command and ensuring those with decision-making power have access to the information they need to move forward. The first county commission meeting where PCF presented organizations to consider for ARPA funds highlighted the fact that some important details regarding these organizations had not been shared with commissioners. Ensuring the right information got to those who needed it resulted in greater trust in the recommendations.

Support smooth transitions by providing staff ample time and space to acclimate to and manage process changes and role shifts. Many of UWGA's staff have over 10 years of experience using a different model of grantmaking. While change can be exciting for some, it was important not to rush implementation and assume that everyone was supportive or understood how to operate differently. Professional development for the grantmaking staff ensured everyone was ready for the changes.

Building trust and doing homework as a funder is key for a new grantmaking approach to be successful. When entering a new arena, as UWGA did when they launched the Racial Equity and Healing Fund, it's important to find ways to work with other funders or intermediaries to deepen your understanding of organizations and issues. UWGA had historically funded human service organizations—and not ones focused on movement building. One of the fund's guiding principles was that, to get to systems-level changes, they needed to invest in a mixture of organizations that deliver programs and services, utilize community organizing as a tool to inform, shape and drive change with the voices of those closest to the problem, and advocate for policy changes at the local and state level.

Significant changes require support and leadership from the top. UWGA's executive leaders and board members were very supportive of the new grantmaking approach. Board members understood the implications of the changes and connected with philanthropic leaders in the community to champion the organization's evolution. At PCF, staff presented the various government partnerships just as they would have any other philanthropic partnership—an opportunity to do more for the community they served. Thinking of the funds as public philanthropy and the government agencies as public donors helped board members work through questions and realize the work fell within the organization's mission. ⩕

Lita Ugarte Pardi (she, her, ella) is the knowledge and learning director at PEAK Grantmaking.

The Future of Knowledge Work Depends on Centering Equity

By Angela K. Frusciante

Grantmaking has utilized knowledge practices since its beginnings, from research for demonstration projects to evaluations and assessments of grant impact. Today, we use surveys, focus groups, grant reporting, evaluation, landscape scans, and similar activities. However, many knowledge work practices are rooted in outdated foundation approaches. Grants professionals often bump up against concepts, tools, and methods for knowledge building that ultimately undermine efforts to embed more equitable grantmaking practices across the sector.

PEAK2023 attendees *(pictured throughout)* attended a session where Angela Frusciante shared how knowledge work is being practiced in the context of grants management. *Photos by Greg Smith.*

In the past decade, more and more grants professionals have taken on roles that relate to knowledge work. A quick scan of PEAK's list of more than 8,000 members shows that over 10 percent of professionals now have titles that somehow relate to knowledge work, including research services, measurement and evaluation, evidence and learning, data systems, data operations, information technology, social impact, and insights. Consequently, developing intentional knowledge practices that are centered on shared meaning-making is crucial to the future of the field.

When we center shared meaning-making, we can ask what knowledge work is and what knowledge work can do when we make it central to change and equity strategy. However, there is so much information coming at us every minute of every day that it's easy to get inundated, and difficult to build the kind of equitable knowledge work practices that have helped to energize our sector's growth. By making three key shifts in how we understand knowledge work, we can lay the foundation for developing a uniquely creative and varied toolkit for the sector.

1. Embrace the social context

Like many of you, I have experienced years of subtle and not-so-subtle messages stating that knowledge is something produced outside of myself. It is something that someone else makes and which we then accept and use. We are taught that knowledge tools and approaches are created by people in positions of authority, and that we have to attend big institutions to become those people.

However, for as much as we may value the notion of skills and experience, focusing exclusively on formal expertise doesn't keep us steady and strong in our knowledge work.

Rather, focusing on the essence of knowledge work—meaning-making—is what keeps us grounded. Meaning-making is active and is constructed socially. Context matters. Our understanding and lived experiences of the social structures around us make a difference as we develop efforts and strategies to change inequitable structures.

"Our understanding and lived experiences of the social structures around us make a difference as we develop efforts and strategies to change inequitable structures."

Once we frame knowledge as being socially constructed, we must ask questions that challenge old norms. Who is involved in meaning-making? Whose questions are being addressed? Whose interpretations are prioritized? How are possibilities for change narrowed or expanded through our methods and processes?

When I have facilitated discussions that start by questioning knowledge itself, we can then explore challenges from past research and data training. We discuss the wonder of exploration, the challenges of credibility, and the power of naming truths. We acknowledge the pain related to the ways that research has historically been used to oppress communities in order to maintain dominant narratives. At times, memories of grandparents and stories of wisdom-sharing are brought into the room. As a result, we create space for healing and creativity that allows us to explore how knowledge work needs to drive equity going forward.

This more expansive framing may bring up insecurities around expertise or fears of being seen as imperfect because traditional norms are not being upheld. But consider that, for knowledge processes to be trustworthy and credible, it is more important to offer transparency in our processes and create dynamics that honor multiple perspectives than it is to consult with, or try being, a "perfect" expert.


"For knowledge processes to be trustworthy and credible, it is more important to offer transparency in our processes and create dynamics that honor multiple perspectives than it is to consult with, or try being, a 'perfect' expert."

2. Recognize the power dynamics inherent in knowledge work

Power is often an uncomfortable word for those guiding knowledge work. A sense of humbleness is important in that it encourages us to realize the limits of our own experiences and perspectives and to keep us seeking deeper understandings. Unfortunately, humbleness can also disguise knowledge work as passive and can prevent us from acknowledging the power dynamics in our knowledge practice—and that's when we risk doing damage through our processes. Humbleness can also lead us to exclude people from knowledge work, thinking that the work is secondary or not important enough to take up others' time and space.

The questions we ask, the parties we invite to do data collection and analysis, and the decisions we make about how to represent and share interpretations of data all require focused attention in order to expand access to knowledge processes. Creating an environment where meaning-making is more accessible and inclusive is one of the most powerful actions grantmaking professionals can take in their knowledge work. Acknowledging the power dynamics in knowledge practice makes knowledge work a leadership endeavor. However, this is not about where the role is positioned within an organization. Rather, it's about how the role of guiding knowledge work is embodied and enacted.
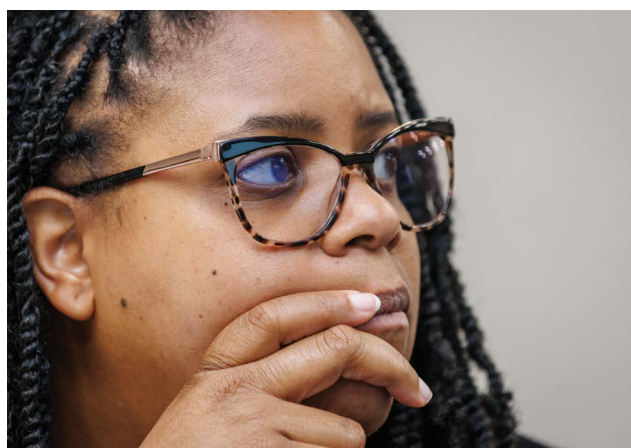
By maintaining a leadership focus, we are prompted to reflect on our ethics as we design a grants management system, a program evaluation, and the ways we facilitate capacity building or grantee network engagement. We can design knowledge frameworks to encourage power sharing rather than extraction. We can show up for knowledge work in solidarity with community partners rather than as an authority. We can harness knowledge practices to collectively voice structural inequities rather than status quo ideas and behaviors. These are all made possible through conscious decision-making in our knowledge practice.

"We can design knowledge frameworks to encourage power sharing rather than extraction. We can show up for knowledge work in solidarity with community partners rather than as an authority. We can harness knowledge practices to collectively voice structural inequities rather than status quo ideas and behaviors."

3. Advocate for trajectory framing

This third shift is about what we do with the power embodied in, and enacted through, knowledge work. Even though our responsibility as grants professionals is to align our work with strategic change goals, it is actually more appropriate in knowledge work to talk about the trajectories that the knowledge work is enabling. Rather than setting a benchmark to be obtained, trajectory framing is about acknowledging where we have been and where we are being called to go. We negate the creative potential of knowledge work when we assign a set goal to it or when we reduce it to a list of activities to be checked off. When, instead, we ask ourselves how our knowledge practices are helping to move us along a trajectory toward equity, we can realize the value of knowledge work itself.

Trajectories can start off as very conceptual, like "moving from oppression and restriction toward expansion," or "moving from fragmentation and divisiveness toward unity in diversity." However, in order to become real, we need to emphasize the on-the-ground action behind the trajectory framing in our knowledge work.

For example, include grantee partners in the meaning-making process by discussing with them the most important questions to ask on an annual grantee report. Grantee partners are likely the most important people to include in this analysis, which seeks to understand what community data should actually mean to programming decisions. One possibility for using knowledge practice to address divisiveness might be to include cross-department colleagues in listening to and interpreting focus group discussions, and including their interpretations when reporting on the meaning of the data for various aspects of the foundation's activity.

Trajectory framing can be evident in an organization's culture or way of operating internally, and can also take an outward focus on programming and capacity or on network building. Whether internally or externally focused, shifting from goal-centered thinking to trajectory framing is crucial as it applies to our knowledge efforts themselves. It is an important way to harness opportunities that can energize social movements and positive change.

What we can do next

In making these shifts, we fully acknowledge that the essence of knowledge work is meaning-making and that knowledge practice is central to equitable change. Grants professionals, via their responsibilities in designing knowledge processes, can take the lead in reimagining knowledge work for a philanthropic sector that is expansive, collective, active, and iterative. Together, we can create more inclusive ways to make meaning with our grantee and community partners.

We can also bring colleagues into knowledge work processes and fully integrate knowledge work into our foundations' activities. We can prioritize sharing multiple interpretations of the information that we collect. We can create space for opening up to an exciting discussion of our knowledge intentions, challenges, and tools. We can help each other, and the sector, build new skills and competencies that fully align knowledge practice with our equity desires. Let us reimagine a knowledge field within the philanthropic sector that acknowledges the importance of knowledge work to change efforts. ⋀

Angela K. Frusciante, PhD, (she, her, hers) is the founder and principal of Knowledge Designs to Change, a strategy and research partner to change agents working in philanthropically funded equity initiatives.

PEAK Community

We have been on a journey to learn, share, and evolve together both internally and externally at PEAK Grantmaking over the past few years. Sometimes that has meant evolving out of necessity and learning as we go—like when we canceled our 2020 annual convening and made the great pivot to a virtual event. Oftentimes, we learn and evolve out of hope—the hope to create something new, unique, and aspirational as a community.

This learning and evolution has come in many forms, like piloting sabbaticals for PEAK staff, creating new peer groups, developing a reimagined GM101 cohort, shifting our focus to squarely drive equity in philanthropy, and more. This past year, we were excited to reunite our community at our first in-person convening in over four years, welcome new Organization Members to our network, host an inspirational Volunteer Leadership Summit, bring board and staff together for our second annual retreat, and continue learning, evolving and sharing along the way.

What's so special about our community is our commitment to doing this together and sharing with one another whether it's the good, the bad, or the "we'll never do that again." In the pages that follow, we take a look at this journey within the PEAK community to transform philanthropy through sharing what we learn and evolving our practices and give you a look at what's to come.

Sara Richman Sanders (she, her, hers)
Membership and Community Engagement Director

New board members gathered on the PEAK2023 stage at PEAK's annual meeting (*from left to right*): **Theresa Jackson**, Seybert Foundation; **Roland Kennedy, Jr.**, Carnegie Corporation of New York; **Justine Palacios**, Arnold Ventures; **Kyrstin Thorson Rogers**, Proteus Fund; and **Kelli Rojas**, Rose Community Foundation.

Members of PEAK's 2023 board executive committee (*from left to right*): Cochair **Ify Mora**, Margaret A. Cargill Philanthropies; Cochair **Miyesha Perry**, Bainum Family Foundation; Treasurer **Elsa Chin**, JPMorgan Chase & Co.; and Secretary **Jane Ward**, National Park Foundation.

Board of Directors Update

We are excited for the board to continue their work under the direction of cochairs **Ify Mora**, Margaret A. Cargill Philanthropies, and **Miyesha Perry**, Bainum Family Foundation. We also extend our deepest gratitude to board members **Kevin Bolduc**, The Center for Effective Philanthropy; **Janet Camarena**, Candid; and **Tim Robinson**, Lumina Foundation, for completing two terms on the board.

The nominating committee, cochaired by Perry and **Allison Gister**, Conrad N. Hilton Foundation, convened in fall 2023 to recommend candidates for the 2024–2027 term. The committee focused on ensuring diversity in personal demographics, organization type, job band, and region, and prioritized candidates' demonstrated dedication to PEAK's Principles and community, as well as

their experience in and commitment to equity and inclusion, evaluation, finance, and fundraising.

We look forward to sharing these new candidates for approval by our membership in early 2024. Special thanks to committee members **Jamie Amagai**, a PEAK board alum; **Kathleen Badejo**, William & Flora Hewlett Foundation; **Andrew Brown**, American Red Cross–Community Adaptation Program; **Juliana Chessin**, The Commonwealth Fund; **Stephanie Duffy**, McKnight Foundation and PEAK board alum; **Alexandria Featherston-Gomez**, Kenneth Rainin Foundation; **Dan Gaff**, May & Stanley Smith Charitable Trust; **Jim Gallagher**, Ford Foundation; **Melodie Griffin**, CareQuest Institute; **Kerri Hurley**, Barr Foundation and PEAK board alum; **Deena Lauver Scotti**, Missouri Foundation for Health; and **Shantelice White**, MacArthur Foundation.

Our Second Annual Staff and Board Retreat

PEAK staff and board members met in Minneapolis last July to connect, learn, and have meaningful conversations about PEAK's strategy, values, and advocacy. Over several days, staff and board members spent time getting to know each other and discussing PEAK's recently developed objectives and key results. In addition to organizational development sessions focused on collaboration and mutual support, the group dedicated time to social connection via a Twins baseball game, kayaking, and dinner during a boat ride down the Mississippi.

We appreciate the energy and support we received from our facilitators **Jackie Hanselmann Sergi**, Radical Spark Coaching; **Natasha Harrison**, CommunityBuild Ventures; **Mia Roberts**, FreshPower; and **Daniel Weinzveg**, The Meeting Guru; and from our meeting planner **Marva Lewis McKnight**, MLM Consulting. We'd also like to thank **Ify Mora** and Margaret A. Cargill Philanthropies for hosting us.

Our Team's Equity Journey

For our team, 2023 was a year of growth as we delved into both individual and collective intersectional equity journeys alongside partners who brought deep knowledge and lived experience to guide and support us. Ultimately, it was work that both brought us closer together as a team and deepened each person's connection to PEAK's mission to drive equity in philanthropy.

Last summer, staff completed a yearlong racial equity journey with **CommunityBuild Ventures**. During that time, everyone engaged in a series of 10 half-day sessions that helped us to develop skills in Brave Space Building™—a framework for creating a supportive working environment that allows members to show up fully as

themselves so they can share experiences authentically and engage more deeply in conversations that center race. We send our deepest thanks to founder **Natasha Harrison**, and to **Melanie Dillett-Dukes**, PhD, and **Vanessa Parker** for facilitating this transformative learning experience.

We also made great progress in our disability inclusion journey in 2023. After signing onto the **Disability & Philanthropy Forum**'s Disability Inclusion Pledge in 2022, staff members have engaged in ongoing individual and group learning experiences while advancing work in operationalizing accessibility practices.

PEAK's New Association Management System

As part of our efforts to become a next-level nonprofit membership association, we are excited to launch a new association management system (AMS) this summer! Our new AMS promises an improved online experience for everyone logging in, accessing resources, and registering for events; increased capabilities for tracking member information and engagement; and a better interface for our expanding membership support team. At the same time, we are working diligently to update our internal people processes to promote effective, efficient collaboration across our growing staff.

TEAM NEWS

- **Satonya Fair** was among the inaugural cohort of nine nonprofit leaders graduating from The Center on Community Philanthropy at the Clinton School of Public Service's **Racial Healing Certification Program**—the first designation of its kind and a yearlong commitment to acquiring tools and developing skills to engage in personal and interpersonal work of racial healing. Here, Satonya (*top left*) is joined by **Dolores Estrada** at the graduation ceremony.

- Members of the PEAK team spent 70 hours in 2023 pitching in on nonprofit marketing and communications projects, conducting mock interviews for high school students joining the workforce, and supporting after-school programs. Here (*bottom, from left to right*), **Betsy Reid**, **Caitlin McDanels**, and **Jesse Rhodes** are shown volunteering with Trees Atlanta to help maintain Atlanta's Beltline arboretum.

- **Rafael Torres** is volunteering on the EPIP 2024 conference planning committee.

- **Dolores Estrada** was the keynote speaker at the eighth annual Transform Arizona luncheon last November.

- **Satonya Fair**, **Lita Ugarte Pardi**, and **Betsy Reid** participated in the FutureGood Studio Fall23 Cohort, led by futurist Trisha Harris.

- **Betsy Reid** served on the United Philanthropy Forum's 2023 conference planning committee, and **Dionne Thompson** is volunteering on the 2024 committee.

Volunteer Leader Retreat at PEAK2023

For the first time ever, PEAK chapter and peer group leaders met together for an in-person retreat. With a focus on networking, innovative ways to engage members, and expanding volunteer management skills, participants discussed the highs and lows of managing groups as well as best practices, resources, and methods for hosting impactful and meaningful programs.

Spark Consulting Chief Strategist **Elizabeth Weaver Engel** served as a facilitator for the retreat, leading conversations on volunteer recruitment, retention, and succession planning. These discussions sparked many questions and aha moments, helping leaders feel more connected to their work.

Participants also attended volunteer management training, where role-playing allowed them to practice recruiting, engaging, and supporting volunteers; to share ideas; and to pose creative solutions for the challenges that arise when leading diverse communities. The retreat left both PEAK staff and volunteer leaders primed with innovative tactics to try in the new year.

The 2023 Volunteer Leadership Summit

The Volunteer Leadership Summit is PEAK's signature annual fall gathering of staff and volunteer leaders, including peer group and chapter leaders, our board of directors, board alumni, and committee and council members. The summit offers time, space, and learnings to enhance leadership and professional skills, deepen connections, practice self-care, network, and enrich our professional community.

Over 170 volunteer leaders registered for this virtual four-day convening, packed with phenomenal speakers *(above, from left to right)*. **Marissa Lifshen Steinberger**, One Eleven Leadership, and **Rachel Kimber**, Smile Train, led exercises for aligning personal values with career goals; **Alex Berry** of Chocolate Milk Diplomacy demonstrated skills mapping; and **CarolLaine García**, PhD, encouraged radical self-adoration.

With a flexible, accessible, attend-as-you-can schedule, participants were able to spend time reflecting on the complexity of their identities, learning to practice self-adoration as a gateway to authentic leadership, and building deeply connected communities of support.

Several participants shared insights on LinkedIn. Among them was **Abigail Osei** from The Starr Foundation, sharing "Day 4 had me in tears and cheers. Thank you, CarolLaine M García for such a transformative presentation. You took concepts that many of us have heard repeatedly but presented them in a practical, relevant, and tangible way."

PEAK extends appreciation to our amazing volunteer planning committee members: **Audra Aucoin**, Institute for New Economic Thinking; **Kim Canfield**, The James Irvine Foundation; **Melodie Griffin**, CareQuest Institute for Oral Health; **Bryttnee Parris**, Ford Foundation; **Danette Peters**, Philanthropy.io; **Jody Marshall**, Seeding Justice; and **Stephanie Richards**, Morgan Family Foundation. Their ideas and thoughtfulness contributed to an engaging and balanced summit. We also send an extra special thank you to longtime PEAK volunteer **Dan Gaff** and the May & Stanley Smith Charitable Trust for sponsoring the 2023 summit!

Announcing PEAK's Learning to LEAD Cohort

Facilitated by **Marissa Lifshen Steinberger**, this cohort-based virtual program combines the benefits of one-on-one coaching, professional development workshops, and team-building experiences to support participants with the powerful pairing of transformative tools and frameworks with a nurturing community.

PEAK recognizes the potential of our volunteer leaders to be change agents for equitable, effective grantmaking practices, and we are excited to offer this program as a unique, complimentary benefit for a small cohort of volunteer leaders who aim to reimagine what is possible for themselves, their careers, and philanthropy.

Congratulations to our inaugural LEAD participants: **Kelsey Andersen**, Arcus Foundation; **Jennifer Katell**, Sequoia Climate Foundation; **Cecilia Rivas-Gonzales**, The Frederick A. DeLuca Foundation; **Jeaiza Quinones Ivory**, Community Foundation for Southern Arizona; **Tram Kieu**, Cooper Foundation; **Kim Lehman**, Bohemian Foundation; **Sarina Raby**, Jewish Community Foundation Los Angeles; **Stephanie Richards**, Morgan Family Foundation; **Grace Asenjo Tenenzaph**, Claims Conference; and **Mary Thurston**, Science Philanthropy Alliance

Sha-Kim Wilson is now senior director, strategic partnerships at Tides.

Chris Cardona has started at MacArthur Foundation as managing director, exploration, discovery, and programs.

PEAK board alum **Stacey Smida** celebrated her 25th anniversary with Cargill.

Beth Harris has started as grants manager at Meyer Foundation.

PEAK2023 Planning Committee Cochair and PEAK Northern California Vice Chair **Daniel Oviedo** has been promoted to grantmaking practice manager at Stupski Foundation.

PEAK Midwest Cochair **Jenna Beltrano** is now program officer at Evanston Community Foundation.

PEAK2022 Planning Committee member **Alexandria Featherston-Gomez** *(above)* has been promoted to grants officer at Kenneth Rainin Foundation.

Russell Johnson has retired from HealthSpark Foundation.

Bonnie Look, Rogers Family Foundation, earned her Salesforce Business Analyst certification.

Erik Torch is now executive director at Lloyd K. Johnson Foundation.

Past PEAK Florida volunteer **Brittany Timmons** is now director, grants management at Comic Relief US.

Angel Rogalski has started at American Diabetes Association as manager, research programs.

Megan Morrison has started at BDO as senior manager.

Board alum **Jonathan Goldberg** has been promoted to vice president, learning and impact at Surdna Foundation.

PEAK Rocky Mountain Chair **Kelly Costello** has been promoted to director of grants management at Rose Community Foundation.

Isabel Sousa-Rodriguez has started as division director of culture and operations for Latin America and the Caribbean at Open Society Foundations.

PEAK2023 Planning Committee member **Nikki Wachter** has been promoted to director of grants management at Ascendium Education Group.

PEAK board member **Jane Ward** has started at National Park Foundation as senior director of grants administration.

Diane Grossman, PEAK Small Foundations Affinity Group cochair, has been promoted to executive director at Sheltering Arms Foundation.

Aida Cheng has been promoted to grants management associate at Rockefeller Brothers Fund.

Shana Sabbath is now grants manager at Montgomery County Public Schools Educational Foundation.

Wendi Gephart has started a new role as grants administrator at Pierce Transit.

Bo Dorsey has been promoted to membership manager at Grantmakers for Effective Organizations.

Board alum **Chris Percopo** has been promoted to senior director of grants management and operations at the Leona M. and Harry B. Helmsley Charitable Trust.

Sarah Berluche is now grants manager at Perspective Fund.

Michelle Cooper is now the chief financial officer at Emerging Practitioners in Philanthropy.

Antoinette Harris is now director of grants management at Disability Rights Fund.

Erin Dirksen has started a new role at Margaret A. Cargill Philanthropies as program associate, animal welfare.

Past PEAK Florida volunteer **Jaime Dixon** is now senior technical implementation specialist at Fluxx.

Blanch Vance, former PEAK Black Caucus cochair, has been promoted to senior manager, grants, and strategic operations at The Grove Foundation.

Latinx Caucus Cochair **Cecilia Rivas-Gonzalez** has been promoted to program officer at The Frederick A. DeLuca Foundation.

Adriana Jiménez, past PEAK board cochair, started a new job as director of grants management at Resources Legacy Fund.

Annie Nelson has started a new role as program officer at Mathile Family Foundation

PEAK New England Leadership Committee member **Molly Lattanzi** is now grants and contracts management consultant at Barr Foundation

Past PEAK Delaware Valley volunteer **Azuredee Webb** is now senior specialist, grants and contract services at Bill & Melinda Gates Foundation.

Carly Hare *(above)* is now portfolio director at The Colorado Health Foundation.

Katherine Robiadek, PhD, PEAK Greater Washington DC Leadership Committee member, has started as assistant professor at Xavier University.

Susan Hairston has been selected to join the inaugural cohort of the Leadership and Society Initiative at University of Chicago.

Yeshi TekleMichael has started a new role as grants manager at Sobrato Family Foundation.

Past PEAK Southeast volunteer **Michael Castens** has started as grants associate at Democracy Fund.

Past PEAK Pacific Northwest volunteer **Jody Marshall** has started a new role as programs director at Seeding Justice.

AANHPI Caucus Cochair **Elaine Mui** has been promoted to director of grants and operations at General Service Foundation.

Shantelice White, previously a *PEAK Grantmaking Journal* guest editor and former PEAK Black Caucus cochair, is associate director, grant operations at MacArthur Foundation.

Wanda Mirosalva Peguero has started a new role as grants administrator at F.M. Kirby Foundation.

PEAK2022 Planning Committee member **Leena Jones** is now grants manager at Energy Foundation.

Samiaya Bradford-Lathan is now grants and grantmaking operations manager at Arcus Foundation

PEAK Northern California Cochair and board alum **Patrick Taylor** *(above)* is now director of grants management at Sobrato Family Foundation.

Past PEAK Executive Director **Michelle Greanias** is now a philanthropy consultant.

Eric Patton has started a new role as director of grants management at St. David's Foundation.

Roberto Cremonini has been named GivingData's first chief innovation officer.

Vu Le was announced as the inaugural winner of National Committee for Responsive Philanthropy's Pablo Eisenberg Memorial Prize for Philanthropy Criticism.

PEAK Midwest Membership Cochair **Wendy Vendel** has been promoted to director of operations at Paul M. Angell Foundation.
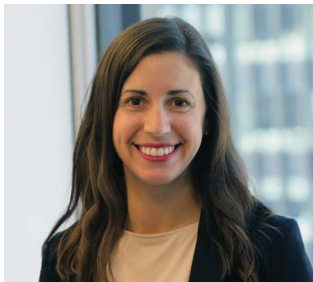
Jessa Thomas *(above)* has been promoted to senior manager, social impact advisor at Capital One.

Hannah Kahn has been promoted to chief information officer at Arnold Ventures.

Past PEAK Mideast Cochair **Kristen Summers** has started a new role as senior advisor, grants manager at Rockefeller Philanthropy Advisors.

Alexis Martinez *(above)*, PEAK Greater Washington DC Leadership Committee member, has been promoted to senior partnerships associate at Meyer Foundation.

Kristopher LeCorgne has started at Bezos Earth Fund as grants manager.

Maria-Veronica Banks is now grants manager at Bezos Earth Fund.

PEAK2022 and PEAK2023 Planning Committee member **Stephanie Richards** *(above)* has been promoted to grants and operations coordinator at Morgan Family Foundation.

PEAK board alum **Suzanne Shea** has retired from the Ford Foundation.

Sabrina Greig, The NBA Foundation, has been selected for ABFE's Connecting Leadership Fellowship Program.

Irene Chansawang, PEAK AANHPI Caucus cochair, has been promoted to senior grants specialist at Maddie's Fund.

New York Women's Foundation was among those awarded a 2023 NCRP IMPACT award.

Kurt Miller has been promoted to director, grants management at Annie E. Casey Foundation.

Sushma Raman is now president and CEO at Heising-Simons Foundation.

Sheryl Saturnino, a former PEAK AANHPI Caucus cochair, has been promoted to community investments manager at The Miami Foundation.

PEAK Greater Washington DC Leadership Committee member **Erin Matthews Thomas** has been promoted to interim executive director at Potomac Health Foundation.

Send your news for the next edition to
info@peakgrantmaking.org

Welcome, New Organization Members

Ability Central

American Association of University Women (AAUW)

American Red Cross Community Adaptation Program

Amethyst Interactive*

Anschutz Family Foundation

Baltimore Children & Youth Fund

Bearman Consulting*

Bezos Earth Fund

bi3

Breakthrough Energy

Cambia Health Foundation

CareQuest Institute for Oral Health

Caring for Colorado Foundation

Cherry Strategies*

The Chicago Community Trust

Christopher Family Foundation

Civic Allies Consulting*

Cogan Associates*

Co-Impact Philanthropic Funds

Common Counsel Foundation

Community Foundation for Southern Arizona

Community Foundation of Greater Memphis

Con Edison

Delta Dental Community Care Foundation

Denver Arts & Venues

Desert Healthcare District & Foundation

ECMC Foundation

FIRST 5 Santa Clara County

First 5 Sonoma County

Florida Philanthropic Network

FocuseD Consulting*

Foundation for a Healthy St. Petersburg

Foundation for Community Health

The George Gund Foundation

Grantmakers in the Arts

The Greater Clark Foundation

Headwaters Foundation

Howard Gilman Foundation

Humana Foundation

IEHP Foundation

Imaginable Futures Foundation

The John E. Fetzer Institute

Kataly Foundation

Kate B. Reynolds Charitable Trust

The Leon Levine Foundation

The Lighthouse Black Girl Projects

Listen4Good*

The Lutheran Foundation

Marie Lamfrom Charitable Foundation

Marine Tenure Initiative

MLSE Foundation

Movement Strategy Center

Ms. Foundation for Women

National Board of Medical Examiners

National Park Foundation

NextFifty Initiative

Omidyar Network

Opportunity Fund

Partnership for Better Health

Philanthropy Southeast

Schultz Family Foundation

Seeding Justice

Segal Family Foundation

Sensible Philanthropy Support Systems*

Society of Exploration Geophysicists

St. Louis City Senior Fund

Stichting SED Fund

Think Twice*

Vanguard

Vitalyst Health Foundation

Vivo Foundation

Waco Foundation

Wagner Foundation

Wayfarer Foundation

We Mean Business Coalition

Williamsburg Health Foundation

*Consultant Members

PEAK's volunteer chapter leaders are committed to engaging the community, and 2023 was an exceptional year for meetings, networking, and connecting. They aimed high, fostering a creative and innovative spirit of practice change in the most meaningful ways, guided by our Principles. Technology and data visualization played a significant role in community conversations focused on grants professionals' tools for becoming more inclusive. Additionally, chapter leaders introduced lighthearted activities to bring more fun into the profession, fostering deeper relationships and helping our community of change agents stay motivated. We are grateful for the dedication of our volunteers, who help our chapters develop and strengthen meaningful connections while inspiring deeper learning.

PEAK Minnesota hosted its first in-person coffee chat since 2019. Held at the McKnight Foundation, it provided an excellent opportunity to reconnect, network, and catch up on the latest news. It also served as a warm welcome for new members, allowing them to begin building meaningful relationships within the community.

PEAK Northern California collaborated with **PEAK Rocky Mountain** to discuss the practical aspects of introducing new reporting techniques, including methods for cooperating internally, determining when to involve nonprofit partners, and handling legal concerns as may arise. The event also provided attendees with an overview of PEAK's Learn, Share, Evolve Principle and a chance to exchange ideas.

PEAK Pacific Northwest hosted a hybrid meeting that marked the chapter's first time gathering in-person since 2019. The primary objective was to reconnect, network, and share best practices and tools for using technology to promote equity and effectiveness. The session featured several engaging speakers and was steered by Partnerships Director **C. Davis Fischer** and consultant **Kyle Renninger**.

In early 2023, **PEAK Southern California** offered a sneak-peek into the highly anticipated PEAK2023 convening. Members engaged in a lively discussion, sharing memories of past convenings and tips for those planning to attend—a truly heartening experience, especially to hear from members who have attended for over 15 years. The session also drove excitement among first-timers, built camaraderie among members, and set the tone for the upcoming convening.
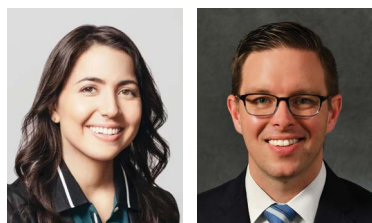
At a **PEAK Rocky Mountain** session, PEAK board members **Justine Palacios** from Arnold Ventures and **Josh Abel** of Nina Mason Pulliam Charitable Trust shared their experiences managing their organizations' legal risks. They covered a range of topics, including grant agreements, funding advocacy and lobbying, and pursuing more ambitious goals via restructured grantmaking practices.
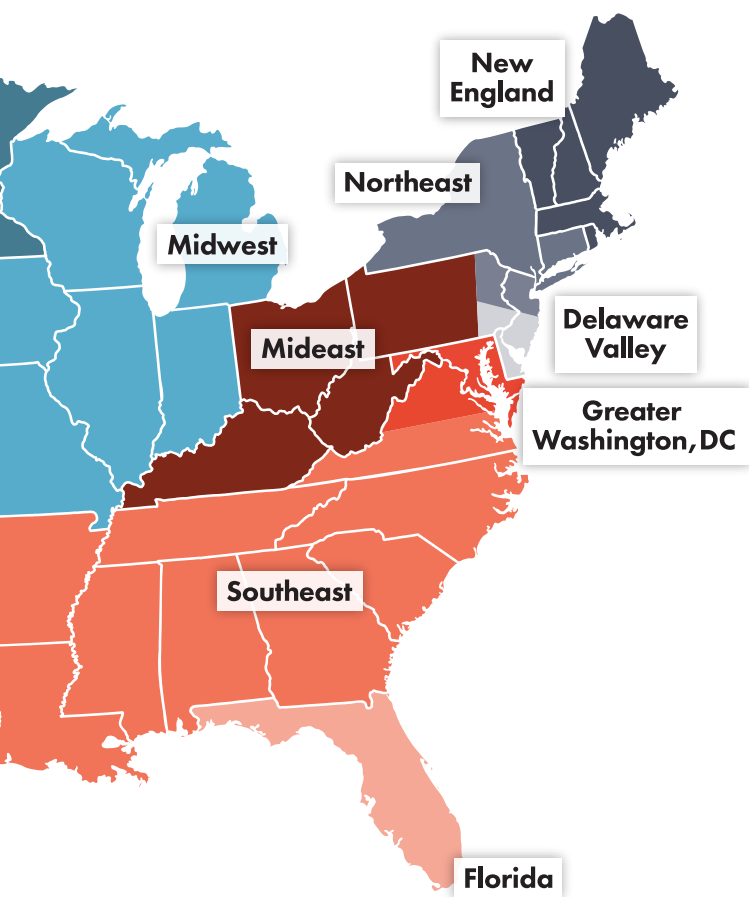
Members participated in a facilitated session on inspiring ownership and leadership among staff without formal leadership titles, led by **PEAK Northeast** in collaboration with **PEAK Southeast, PEAK Midwest**, **PEAK Southern California**, and **Philanthropy New York**. On-hand to share valuable insights were guest speakers **Donita Volkwijn**, Philanthropy New York; **Jason McGill**, PhD, Justice Associates; and **Marissa Lifshen Steinberger**, One Eleven Leadership. Breakout sessions featured robust conversations on leadership and empowerment in the workplace.

PEAK Southwest was joined by two notable guest speakers, Philanthropy Advocates Executive Director **Becky Calahan** and Still Water Foundation CEO **Ellen Ray**, for a presentation centered on the common misconceptions that surround foundation investment in advocacy work, and practical methods that grant professionals can use to dispel them.

Pacific Northwest

Minnesota

Northern California

Rocky Mountain

Southern California

Southwest
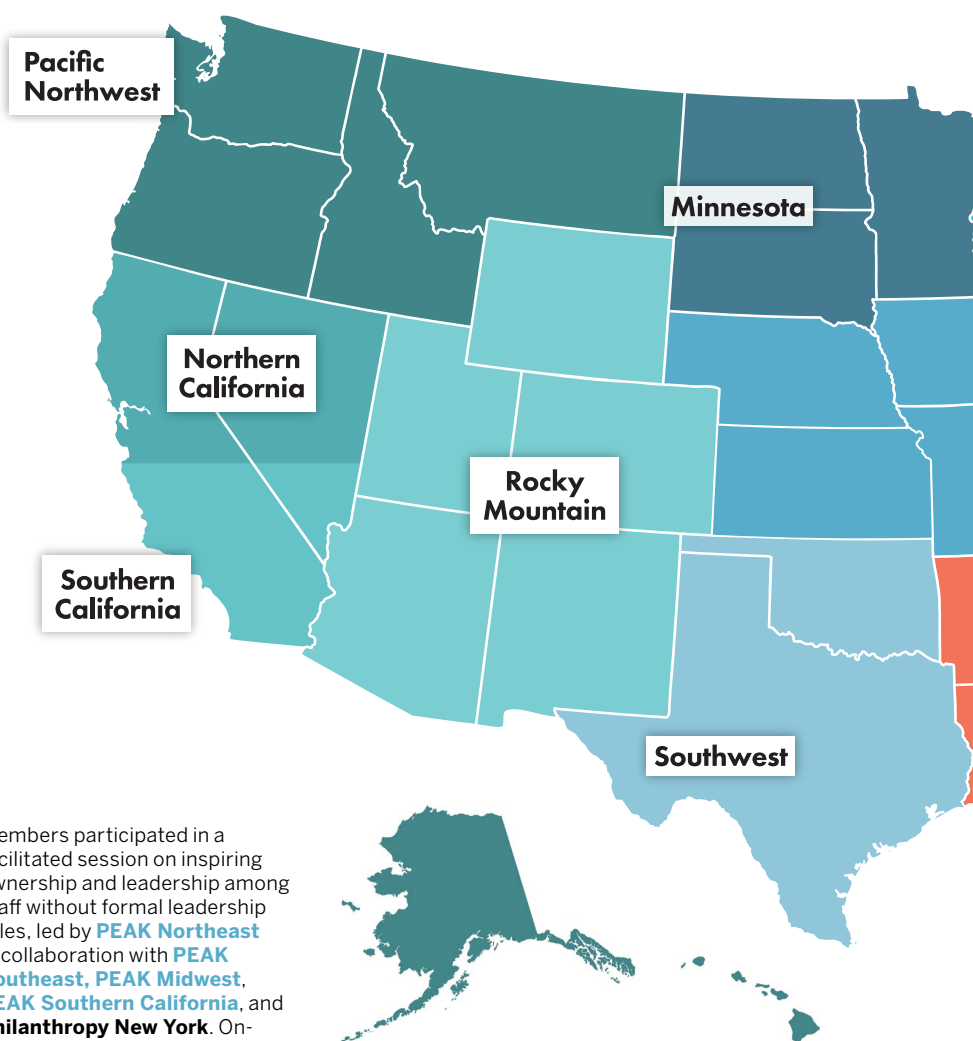
PEAK Midwest hosted a dynamic hybrid gathering on grassroots grantmaking and advocacy. Attendees had the opportunity to learn about data visualization from PEAK Knowledge and Learning Director **Lita Ugarte Pardi** *(above, second from left)*. Fellow speakers *(above, from left)* **Genise Singleton**, Kresge Foundation; **Shamyle Dobbs**, Michigan Community Resources; and **Heidi Alcock**, McGregor Fund participated in a panel, facilitated by **Lauren Janus**, Phila Engaged Giving and PEAK Midwest program cochair, on "What is Philanthropy Doing to Support an Agenda Based on Justice and Equity." We extend our gratitude to The Kresge Foundation for their generosity in hosting the event.

PEAK Delaware Valley hosted an online discussion on ways to increase access to philanthropy, led by **Allison Acevedo** from the National Board of Medical Examiners and **Jen Danifo** from the Pennsylvania Humanities Council. They interviewed **De'Amon Harges** from The Learning Tree, who discussed how communities and philanthropic organizations are bringing communities and grantmakers together to fund important projects.

PEAK New England hosted guest speakers **Naomi Orensten** from the Dorot Foundation and Lauren Janus of Phila Engaged Giving. During this online event, they talked about the advantages of general operating grants and the principles of participatory grantmaking, including ways to elevate community voices, involve community partners, and support participants with stipends and other resources. Here, they gathered at PEAK2023 for a group portrait.

PEAK Greater Washington, DC hosted an engaging event on change management facilitated by organizational development advisor **Christina Buggappa**. Attendees were treated to a comprehensive discourse covering change in terms of people, processes, and systems, including how to evaluate readiness for change and how to implement change through a variety of approaches.

During a **PEAK Mideast** gathering, attendees delved into an all-too-common challenge: tackling antiquated policies, procedures, and manuals. Led by **Kristen Summers** of Rockefeller Philanthropy Advisors, the group worked together to devise a novel approach for enhancing an outdated manual to promote greater efficiency and ease of use. Participants discussed their current processes openly and provided each other with solutions to help streamline this often-overwhelming task. Here, they gathered at PEAK2023 for a group portrait.

During a **PEAK Florida** workshop, **Jennifer Pedroni**, director of BDO and a PEAK board alum, presented valuable techniques for assessing financial records and insights into executing financial due diligence that's focused on effectiveness, impartiality, and consideration for grantees' financial health and capabilities.

A group of funders, including **Leah Jones-Marcus** from Dogwood Health Trust, **Aerial Ozuzu** from Community Foundation of Greater Memphis, **Ashley Whitt** from Spartanburg County Foundation, and **Chloe Wiley** from The Blue Cross and Blue Shield of Louisiana Foundation, joined **PEAK Southeast** for a panel discussion of grantmaking practices in the region, based in interviews with and surveys of the Southeast's grantees and funders. Speakers shared specific solutions for more equitable grantmaking, including ways to shift power dynamics and build partnerships.

In 2023, PEAK's peer groups reached multiple milestones. Most notably, we completed our two-year pilot phase and met in-person for the first time at PEAK2023. PEAK deeply appreciates our amazing volunteer cochairs, whose work planning and executing group sessions provided space for networking, discussion of best practices and emerging grantmaking ideas, professional development, cultural belonging, and personal wellness, as well as special guest speakers sharing their exceptional professional expertise. Peer groups are thriving spaces that continue to grow. As we look to the future, we are creating policies and procedures to review the development of suggested new peer groups, assess and realign the focus of current groups, and ensure consistent, excellent support for everyone involved. Exciting times are ahead for these inclusive learning spaces!

The **Accountability and Action for Allies Caucus**, a group for learning to be a better ally for marginalized populations, hosted a book club meeting on Edgar Villanueva's Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance, discussing actions to take within their organizations. They also hosted a conversation with Showing Up for Racial Justice Development Director of Impact **Ava Bynum**, covering the ways philanthropy can show up in this moment and the ways that foundations' dominant cultural norms can shape nonprofits' access to resources.

The **Asian American, Native Hawaiian, and Pacific Islanders (AANHPI) Caucus** hosted virtual happy hours to connect, network, and support one another. In honor of ANNHPI Heritage Month, they held an in-person boba tea party at PEAK2023, prompting one member to share that it was the first time they had felt "seen" at a conference.

The **Black Caucus** meets every two months for informal opportunities to connect, converse, and network among those who identify as Black, African American, or African. Most recently, they hosted a two-part series featuring PEAK President and CEO **Satonya Fair** and speaker and

writer **Shauna Knox**, PhD, *(left)* titled "What Would it Look Like if Philanthropy Loved Black People?" These sessions took place in-person at PEAK2023 and virtually on Zoom, and provoked rich conversations among participants.

The **DEI Learning and Support Community** hosted meetings where members shared successes, challenges, and ways to continue navigating organizational resistance to advancing DEI. At PEAK2023, they held an in-person session titled "Leaning on Each Other: Collaborative learning to advance our DEI practices," which focused on informal peer-sharing and peer support, insight-sharing and successes, and challenges around pressing topics related to implementing and advancing DEI in member organizations.

The **Equitable Grantmaking Practices Community**, composed of grantmakers with a working knowledge of equity issues who are dedicated to leading as the philanthropic sector operationalizes equity, met quarterly to hold space for peer support, progress check-ins, and goal setting. A recent session reflected on their past two years together, where the community set goals to continue moving equitable practices forward in their respective organizations.

The **Grants Management Directors' Circle (GMDC)**, a community of senior-level grants management leaders at high-asset foundations, meets twice each year in partnership with facilitator **Daniel Weinzveg**. In fall 2023, the GMDC met in Montgomery, Alabama to participate in an "immersive civil rights journey to truth and reconciliation through the lens of cultural humility" with **TruthRetreats**. The grants management teams of these member organizations have also established the **Grants Management Peer Experience** group, which meets biannually to discuss topics chosen by its members. Meeting in-person at PEAK2023, this group held breakout discussions on topics, including equity in grantmaking, people operations, data, and trust-based philanthropy.

The **Intermediaries Affinity Group** hosted a session to discuss their role in the sector through the lens of a movement-focused philanthropic support organization.

Guest speaker **Marissa Tirona**, president of Grantmakers Concerned with Immigrants and Refugees (GCIR), shared the story of GCIR's evolution from a philanthropic supporting organization to a philanthropic mobilizing organization, and how GCIR's practices and stance have shifted as a result.

The **Latinx Caucus** hosts quarterly cafecitos for those identifying as Hispanic, Latino, Latina, or Latinx to engage in professional development and networking, and met for the first time in-person during PEAK2023. They also hosted a session where psychologist, coach, and writer **CarolLaine García**, PhD, facilitated a conversation that explored the power of embracing all your identities to enhance your feelings of joy and peace.

This year, the **Small Foundations Affinity Group** held multiple lunch-and-learn check-ins where group members offered guidance and tips to their small-foundation colleagues—including issue-specific troubleshooting—as well as planning for future events and networking. At PEAK2023, they held an in-person session that offered speed networking and on-the-fly troubleshooting. Members discussed successes, challenges, requests for support, and ideas for the new year.

*Visit **peakgrantmaking.org/peer-groups** to learn more and join.*

Collaborating for Impact

PEAK aims to be truly transformative in our efforts to improve equity for our field—a vision that demands strategic engagements with member organizations, partners, nonprofits, and allies through speaking engagements, innovative partnerships, and being active collaborators with equity conspirators. Here are just a few recent examples of work on this front.

President and CEO Satonya Fair was in conversation with **Vu Le** on democratizing philanthropy at *Stanford Social Innovation Review*'s 2023 Frontiers of Social Innovation conference and joined an **Independent Sector** panel to discuss the findings of their report *Trust in Civil Society*.

Building on our Drive Equity Principle, we are working in close partnership with **Candid**, which is making strides to support a more standardized approach to demographic data collection with their Demographics Via Candid campaign. This campaign seeks to empower nonprofits to share their demographic data a single time on their Candid profile, where it can be accessed and reused by all. Through this initiative, Candid freely provides nonprofit demographic data to render the grantmaking process quicker, easier, and more efficient.

Knowledge and Learning Director **Lita Ugarte Pardi** and **Vanessa Elkan** are serving as faculty for **Philanthropy Northwest**'s Philanthropy 101 program. Last September, they copresented a webinar providing a deep dive into ways for funders to embed equity throughout the grantmaking cycle, the variety of grant types and grantmaking approaches, and ways to manage relationships with nonprofits.

We were excited to welcome our first two fellows to PEAK in 2023. Last spring, **Leah Craig** came on board as communications fellow through **RespectAbility**'s National Leadership Program, an apprenticeship for disability advocates. In July, we welcomed **Makayla Peterson** to the team through **Bowie State University**'s Philanthropy Fellowship program, a new partnership between **ABFE**, Bowie State, and PEAK dedicated to preparing graduate students of color for leadership roles in the nonprofit and philanthropic sectors. Peterson is one of eight fellows in the inaugural class of Bowie State University's Master of Philanthropy and Nonprofit Management degree program.

We collaborated with **Catchafire** on several webinars, featuring Satonya on how grantmakers can better support nonprofit partners to create capacity-building strategies and Chief Strategy Officer **Betsy Reid** as a participant on a panel discussion about bridging the communications gap between funders and nonprofits.

We partnered with the **Center for Disaster Philanthropy** to share their expertise through a series of articles and amplified their online learning opportunities.

We have also begun to explore formal partnerships with regional associations of grantmakers and other philanthropy-supporting organizations with whom we share a common purpose to improve the practice of grantmaking. With organizations like **Florida Philanthropic Network** and **Grantmakers in the Arts**, we hope to standardize offerings of membership swaps and clarify communication channels so that we are able to amplify our good work in both directions.

Discover PEAK's Growing Resource and Insight Collections

Under the Resources and Insights menus, you'll find growing libraries and discoverability tools to help you find what you need. Under Resources, try out customizable search features, including filters for topic, resource type, and Principle. Recent additions include PEAK2023 keynotes which are openly accessible and recorded PEAK2023 sessions—exclusively for PEAK Organization Members—along with select chapter events and sponsored webinars. Under Insights, explore reporting featured in our *PEAK Weekly* and *PEAK Monthly* newsletters, past editions of the *Journal*, and an archive of Weekly Reads posts.
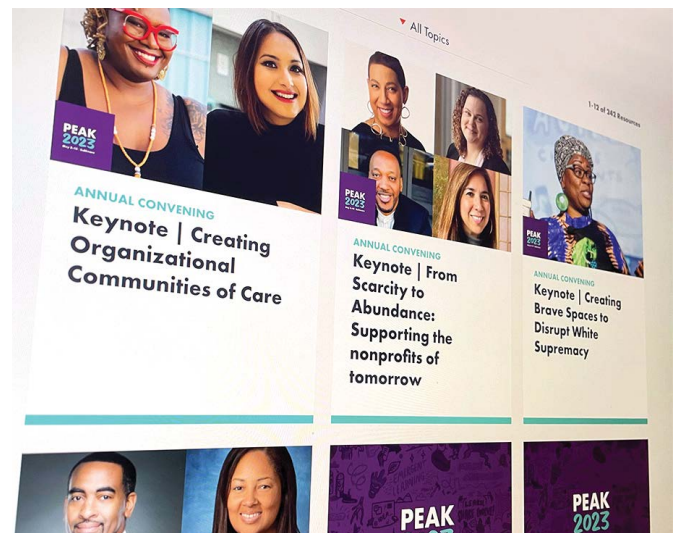
Grants Management 101—Class of 2023

Last August, PEAK launched the 2023 Grants Management 101 (GM101) program, an interactive, virtual, deep-dive learning course on the fundamentals of grants management, the philanthropic sector, and equitable, effective grantmaking practices. Through GM101, a new generation of professionals will become better equipped, connected, and inspired to operationalize equity-centered, values-driven grantmaking practices.

Across four months, the GM101 program featured content sessions presented by a diverse faculty of PEAK staff and guest presenters, coupled with cohort convenings facilitated by senior-level professionals. Each convening provided opportunities for last year's 122 participants to explore content more deeply, receive coaching, and consider strategies for increasing their impact. These small-group sessions were facilitated by six cohort advisors, PEAK board alums offering their leadership, time, expertise, and experience *(left to right, from top row)*: **Sue Fulton**, Endowment for Health; **Chindaly Chounlamountry Griffith**, Streamlife Consulting; **Adin Miller**, Los Altos Mountain View Community Foundation; **Ursula Stewart**, Salesforce.org; **Rikard Treiber**, Hillspire; and **Jennifer Burran**, Fidelity Foundation. PEAK staff are developing an in-person GM101 experience to be offered at PEAK2024 and will also offer the virtual program again in 2024.

Service-Learning Pilot Program Launched

In 2023, PEAK and **BDO** piloted a service-learning program to benefit community-based organizations in the Baltimore and Washington, DC, region as an extension of PEAK2023. Over a three-month period, 20 PEAK members received coaching to learn how to review and analyze nonprofits' IRS filings and hold open, respectful conversations with nonprofit organizations about the financial health story their filings tell. The 20 volunteer members were matched with Baltimore and DC-area nonprofits hoping to better understand how their financial documents are assessed. The program was designed to create a collaborative and safe learning space for both funders and nonprofit leaders to share critical feedback and help to narrow power gaps between grantmakers and nonprofits.

Thank you to our cohort of member volunteers working with nonprofit partners through this pilot, featured at **peakgrantmaking.org/volunteers**.

Salary Survey Report Coming Soon

The data collected from PEAK members through a fall 2023 salary survey will be released in early 2024. Survey questions covered compensation, the grants management profession and function, individual and organizational data, and more. With this unique resource, we're excited to document the breadth of experience within the grants management field while encouraging salary transparency as an equitable practice.

Looking Back at PEAK2023

It was a joyous reunion. Our first in-person convening since 2019 boasted record-breaking attendance, with 966 individuals joining us in Baltimore and 277 online. Across the three days, we debuted new ways of gathering that invited attendees to join us on a collective emergent learning journey toward more equitable, effective grantmaking. We focused on our Learn, Share, Evolve Principle, lifting up stories and insights from across the PEAK community, and exploring ways that members are leaning into each of our five Principles to be activated change agents for philanthropy. Engagement in the convening app was high, and a whopping 96 percent of post-convening survey respondents told us that they would recommend our annual convening to colleagues.

Four diverse keynotes formed the cornerstones of PEAK2023, full of practical tips and inspiration focused on building communities of care that empower all people, and using the power we have to reshape the practice of philanthropy. We partnered with artist Cori Lin to distill the wisdom of our guest speakers into **four graphic recordings** to help our community initiate changemaking conversations at their organizations.

The #PEAK2023baltimore social wall was a hit! Featured on big screens alongside the mainstage and online, the social wall prompted an outpouring of real-time community sharing. Attendees responded enthusiastically by sharing the joy of once again connecting in person (or virtually) and their personal convening highlights. The introduction of a new feature—the ability to post directly—was well-utilized, paving the way for the creation of a PEAK-exclusive social space.

Our opening reception at the Reginald F. Lewis Museum of African American History and Culture was an opportunity for attendees to celebrate reconnecting with the PEAK community and to take in 400 years' worth of Black Marylander history. Attendees also had the opportunity to see a performance of the critically acclaimed play Sizwe Banzi Is Dead. Mounted by Arena Players Incorporated—the oldest continuously operating African American community theater in the United States—the play examines issues of identity in apartheid-era Africa. And a stay in Baltimore wouldn't have been complete without taking in an Orioles game at Camden Yards.

Attendees enthusiastically put emergent learning concepts into practice. Throughout the convening, attendees contributed to our idea boards to offer their perspectives on practices, policies, and processes carried out during the grant life cycle that closely align with equitable grantmaking and take grants management to the next level. By the end of PEAK2023, the boards provided a vivid picture of how our community is approaching the implementation of next-level grantmaking practices. In addition, the world café and open fishbowl breakout session formats were dynamic, interactive opportunities for everyone in the room to listen to and learn from each other. Attendees were also invited to explore topics of their own choosing with their peers by hosting pop-up roundtables.

We reunited—and it felt so good! The entire PEAK community was excited to reconnect and catch up with one another. During the convening, all of our peer networks, including 14 PEAK chapters and our many peer groups, enthusiastically gathered in person to host meetings for their members to network, learn together, and deepen relationships that had been forged online or years ago. Sessions ranged from the purely social and fun to the deeply thought provoking. In addition, some chapters paired opportunities for reconnection and idea sharing with regional flair—like "Being Wicked Smaaht" with PEAK New England or the Greater Washington, DC chapter's capital region-themed "Triviapalooza 2023." *Photos by Greg Smith.*

Reimagining. It's what we'll do together in Seattle this March as we continue our collective emergent learning journey toward more equitable and effective grantmaking practices. The PEAK community can be a beacon that guides philanthropy forward. Join colleagues at PEAK2024 to reimagine the possibilities as we lead the way as change agents in transforming the sector.

Participants can expect **three inspiring keynotes**, along with **50 sessions** following one of our five tracks: Change Agent, Learning Lab, Transformative Funding Strategies, Harnessing Data and Technology, and Professional Growth and Wellness. Open fishbowls, workshops, world cafés, and spark talks will inspire curiosity and engage attendees in sharing insights and experiences.

We'll also kick off our gathering with a festive opening night reception at the **Seattle Art Museum**, bring back our **career center**—complete with headshot studio and coaching sessions—host **chapter and peer group meetings**, and offer opportunities for wellness, networking, and more.

Last year, we reached capacity months before the convening, so we recommend reserving your place (and your hotel room) as early as possible. And if you can't join us in Seattle, join us online, where we'll stream keynotes and selected sessions for virtual participants.

Explore the PEAK2024 microsite for detailed information on keynotes, the schedule, and how to register by visiting **peak2024.peakgrantmaking.org**.

PEAK GRANTMAKING

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Reimagining

PEAK 2024

Seattle MARCH 18-20