

Journal

Fall 2022, Issue 20



PEAK'S

Emergent
Learning



PLAYBOOK



How we learn —as individuals, teams, organizations, and a sector— is key to becoming more effective, equitable grantmakers.

Throughout this edition, we look at the practice of emergent learning, advocating for an approach that is adaptive, inclusive, transparent, and curious. In the development of this issue, our formative conversations with guest editors **Melanie Matthews** and **Shantelice White** resonated with urgent themes regarding the processes and mindsets that allow learning to thrive. We talked about the constructive messiness of idea generation and iteration, reframing “failure” as a necessary part of learning and growth, and making space for all voices—both inside and outside our organizations, including our grantee partners and the communities we all serve.

In this *Journal*, we hear from numerous grants professionals about what being an emergent learner means to them and what it looks like in practice. Further, we highlight PEAK’s own learning journey to operationalize this playbook, both to guide our growth as an organization and to create convenings, resources, and insights that best support our members.

We hope that this *Journal* inspires you to discover some new practices in your learning journey and to join PEAK colleagues in our shared spaces. Together, we will live our Learn, Share, Evolve Principle as we drive equity and transform philanthropy.

Chantias Ford (she, her)
Community Knowledge Manager

Betsy Reid (she, her)
Communications and Marketing Director



We partnered with **Laura Chow Reeve**, founder of Radical Roadmaps, to illustrate this edition, bringing her dual skills as an artist and graphic recorder to create a playbook that visualizes emergent learning concepts. Throughout the *Journal*, Reeve uses marginalia—a fancy term for the notes and sudden ideas you might jot on the sides of your note paper—to show you how a little generative messiness can inspire your own emergent learning journey.

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PEAK Grantmaking Journal is published twice yearly by PEAK Grantmaking. Our community of more than 6,500 grants professionals leads the way in advancing equitable, effective grantmaking practices. Together, we are transforming philanthropy. Learn more at peakgrantmaking.org and follow @PEAKgrantmaking on Twitter and LinkedIn.

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In 2021, PEAK unveiled a new strategic framework anchored by four core ideas that will guide our work in the years ahead. Among them is our core philosophy of emergent learning. What, then, could be more fitting to kick off a year focusing on our Learn, Share, Evolve Principle than an issue dedicated to the potential of adaptive, community-driven learning? This has always been the heart and soul of PEAK's network that is so dedicated to revolutionizing the sector. If the future of grantmaking is adaptive, equitable, and truly effective, then emergent learning is the engine that will get us there. Together, we will harness all the ways we can disrupt this-is-the-way-we've-always-done-it thinking to forge the path forward.

When I look back on my own career, nearly every position I've taken has required me to create new processes and systems or to take a nascent idea to scale. It's taught me not to wait for an invitation to become an architect of ideas, to applaud myself if nobody else is around, and to yell out, "I failed!" (with thanks to BIG: Baltimore Improv Group). Further, it's taught me that just because I took the long road toward a solution does not mean that you have to. I consider it the greatest honor to help others shortcut their way to change.



As PEAK's president and CEO, I must be our emergent-learner-in-chief. I seek out new information and new ways of approaching ideas not just when I realize I lack knowledge on a topic, but because one should never be finished growing professionally or personally. It was Albert Einstein who said, "When you cease to learn, you cease to grow. And when you cease to grow, you cease to improve, get better, move forward and just sort of begin to—exist." When this community takes a look in my direction, I hope it sees someone who is continuously growing.

I also hope you've noticed that PEAK is growing as well! We have a new pep in our step thanks to the increasing diversity of experiences and competencies represented within our staff and on our board.

The PEAK team has begun the process of applying our Principles as an internal operating manual, patiently cocreating the kind of workplace culture that will sustain us as human beings and professionals. With the guidance of CommunityBuild Ventures, we are embarking on a learning journey to help us, individually and collectively, understand racial equity and build the competencies and skills to operationalize it. Together, we'll learn and practice bravely, center racial equity, and heal through the process.

We have wholeheartedly adopted the Disability Inclusion Pledge, which requires us to first examine our current practices—especially in learning and convening spaces—and learn from others who are ahead of us. Most importantly, we're practicing doing better once we know better, which we know requires humility and deep listening to get right.

PEAK's Strategic FRAMEWORK

EMPOWER
members
as CHANGE
agents

CULTIVATE
an EMERGENT
learning
COMMUNITY

DEVELOP
SUSTAINABLE
GROWTH
Models

MAXIMIZE
impact
THROUGH
PARTNERSHIPS

And because we know that we're in this work as a collective, we're creating new models for building and supporting community across funders, other philanthropy-supporting organizations, and nonprofits by centering strategic partnerships.

We're also centering equitable hiring practices, soliciting feedback from candidates, and iterating our approach to rightsize the time and intellectual investment we're asking of each. What we hope is that applying to work at PEAK is the beginning of a relationship with an organization that sees you and your talent.

Finally, we're on the verge of launching new programs, shifting how we learn together, and creating more open spaces for leadership. At PEAK2023 in Baltimore, we'll be centering on you! We want to hear how PEAK has helped your career, your team, your practices, and your organization to live our Learn, Share, Evolve Principle. How are you innovating in the field? What makes a best practice in grantmaking? Where can philanthropy go if more funders practice collaborative, aligned funding? Consider this an open invitation to be there and be inspired!

This edition of the *Journal* amplifies PEAK members who tell the stories of their own emergent learning journeys with vulnerability and openness. Work and life can feel like a test where we're not quite prepared and the stakes are high. As emergent learners, we know that both success and failure can result when trying new things. We also know that *time* can show up as an enemy not only to learning, but also to advancing racial equity and equitable practices. That's why

we hope this *Journal* encourages you to press pause and take the time to learn, prepare, and be inspired to act.

As adrienne maree brown describes in her latest book, *Holding Change*, our work to advance equitable, effective grantmaking practices means attending “to coordination, to conflict, to being humans in authentic and functional relationship with each other—not as a constant ongoing state, but rather a magnificent, mysterious, ever-evolving dynamic in which we must involve ourselves, shape ourselves, and each other.” We must see ourselves as a learning collective of funders, nonprofits, communities, volunteers, staff, thought leaders, and practitioners that is staring straight into the future and taking a giant leap forward together. For me, that's emergent learning distilled to its essence.

Satonya Fair

President and CEO

Satonya's Playbook

- Learning is title-agnostic.
- Use your knowledge for good (no knowledge hoarding, please).
- Celebrate every “I failed” moment.
- Don't wait for an invitation to be the architect of ideas.
- See yourself as part of a learning collective.



Transforming Philanthropy Through Emergent Learning

By Chantias Ford, Melanie Matthews, and Shantelice White

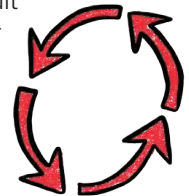
PEAK Grantmaking has always been dedicated to creating communities for grants professionals to embrace our Learn, Share, Evolve Principle. As PEAK looks to its next chapter, we want to leverage our existing peer network structures in new ways to better foster a learning community that embraces and advances adaptive learning processes, and we also want to inspire our members to utilize this approach inside their own organizations. PEAK sees the concepts and practices of emergent learning as a natural fit to advance our work around our Principles for Peak Grantmaking in powerful new ways. Now is the time to define the concepts, qualities, and practices of emergent learning, and how we envision operationalizing it throughout our community and in the sector at large.



Emergent learning defined



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 to a loop of testing and experimenting, learning, implementing what you learn, and testing again.



“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.”

Research and consulting firm Fourth Quadrant Partners—an emergent learning pioneer— describes it as “a field of practice, using a variety of interrelated tools over time as a platform to deepen and institutionalize a group’s ability to consistently achieve or exceed desired outcomes even in the midst of unpredictable challenges.” And in order for organizations to be agile change agents, they need to capture and share what they learn so that the field as a whole can best adapt to community, economic, and societal shifts. This mode of thinking is also social and depends on cultivating cultures of trust that allow for safe, transparent conversation among individuals, teams, grantees, communities, and entire organizations to take place so that knowledge and the change it might inspire can be easily shared and scaled.



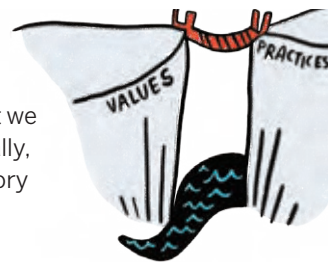


Perhaps most importantly, emergent learning helps us move away from the idea, advanced by dominant culture, that learning is time-limited, formal, written down, and driven by a select few who have preset our learning destination. Instead, emergent learning prescribes an ongoing journey where learning is dynamic and driven by the evolving needs of the individual, the community, the organization, and the sector. It is also driven by the mindset that learning is iterative and that lived experience matters, opening the door for knowledge to be sourced from different sectors, functions, and issue areas. It moves us away from a paradigm that limits us—where knowledge is power, held tightly, and shared deliberately, usually as a result of a financial transaction—to a liberated and democratized approach where knowledge is shared intentionally and freely. We move from learning that focuses on the individual to learning that embraces multiple voices and sets us all on a journey to authentically and effectively change the world!



Key qualities and practices

Many organizations have value statements that align with many of the qualities of emergent learning defined below. But as PEAK's Tie Practices to Values Principle states, there is a big disconnect between the values we claim and the practices that we implement. If we are truly to embrace emergent learning individually, organizationally, and sector-wide, we need to ensure the practices we implement are not contradictory to our intentions.



Curiosity

Curiosity uplifts 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. Here are a few ways you can support curiosity:

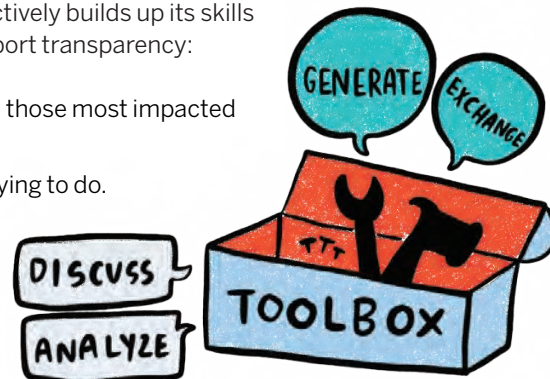
- Structure listening-only, inquiry-based meetings, such as reflection sessions.
- Design flexible project plans that include time for exploratory conversations.
- Implement feedback loops that center psychological safety.



2. Transparency

Emergent learning is rooted in the free exchange of insights to create common understanding and generate discussion that analyzes an issue from multiple perspectives. The sharing of all thoughts and thought processes is encouraged, as each can help to continue the dialogue. Further, these communication skills can be practiced and continuously improved so that, over time, the team collectively builds up its skills for learning better together. Here are a few ways you can support transparency:

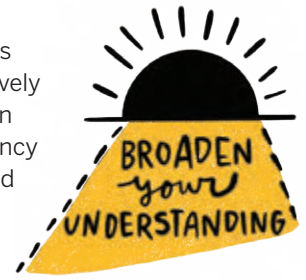
- Share, and conduct an open decision-making process, with those most impacted by the discussion.
- Avoid jargon when articulating what you are, and are not, trying to do.



3.

Diversity

Believing that 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. As Nancy Adler and Allison Gundersen write in *International Dimensions of Organizational Behavior*, "Multicultural competency invites us to consider that we may have similarities and differences based on our lived experience, and that there are many different and equally feasible ways to reach our shared goal." The next time you engage in a review of your practices and processes, remember to invite someone with a different perspective to give voice to the issue. Engage in a meaningful discussion and listen deeply to each perspective. Inviting and including divergent and dissenting opinions will enrich the conversation, broaden your understanding, and help to develop even better solutions. Here are a few ways you can support diversity:



- Solicit dissenting opinions by seeking out and including diverse perspectives.
- Respect and celebrate how divergent thinking adds to the conversation.
- Make diversity and inclusion a personal commitment.

4.

Vulnerability

Emergent learning encourages participants to embrace the unknown, promoting a creative and dynamic work environment that embraces both experimentation and learning from mistakes. "Errors and mistakes are an inherent part of organizational life, and both planned and unplanned change efforts increase their inevitability," write the authors of *Leading and Learning to Change: The Role of Leadership Style and Mindset in Error Learning and Organizational Change*. "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." Our failures do not define us. Instead, they help us to identify new opportunities and make fresh connections, and may lead us to unprecedented paths. Leaders can normalize failure by sharing their mistakes and missteps, and by emphasizing how they used the lessons learned to course correct and grow. Here are a few examples of ways to support vulnerability:



- Ask for feedback and actively listen to the response.
- Be flexible with your timelines, intentions, and desired impact.
- Share what was learned from a mistake and ask follow-up questions.
- Pilot a new project or process, then study and share the results.
- Remember that change will have a psychological effect on stakeholders.

5.

Collaboration

Every person, regardless of their position or background, has valuable contributions to make. And 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. Systems scientist and Massachusetts Institute of Technology Senior Lecturer Peter Senge made the following observation in his book *The Fifth Discipline*: "Team learning is the process of aligning and developing the capacity of a team to create the results its members truly desire." The collaborative nature of emergent learning ensures that an individual, organization, or community can sustain the changes it makes. If only a few people are committed to change, the organization will not progress. The goal is to evolve processes, policies, and practices to reinforce change. Here are a few ways you can support collaboration:



- Articulate the rules of engagement in plain language.
- Invite stakeholders to cocreate valued behavior and norms.



Harnessing the power of emergent learning

Grants management professionals are already activated as emergent learners, even though they might not think of themselves as such. This mindset shows up in various practices in our organizations and across the larger network and field. Remember those 10-year plans we would spend months (or even years) developing? We quickly got to a point where, by the time the plan launched, the world looked very different and our thinking was out of date. Now, we create flexible two-to-three-year frameworks supported by shorter-term plans: tools that can develop and adapt in response to real-time events and ensure that we meet current and emerging needs.



The philanthropic sector put emergent learning principles into practice with the onset of the COVID-19 pandemic. Imagine the detriment to the sector and the organizations and communities we support if, after March 2020, funders had all continued to operate in exactly the same way as before because they “had” to follow the plan. Instead, organizations learned how to do things differently, how to get money into our communities more quickly, how to keep staff safe while continuing to do the work. Philanthropy made big changes and small changes, asked questions of one another for help, and shared what they learned with peers. In a short space of time, we all did our work differently and without a playbook. This collective experience demonstrated that the sector can flex its emergent learning muscle. Now is the time for the sector to build that muscle to better serve a greater good.

Ultimately, emergent learning creates a sector that is more trusting, effective, and efficient. It leads to more creative, constructive questions and more collaborative thinking that 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 and the structures needed to do our work should also change.



“Emergent learning is a game changer that can continuously energize individuals, teams, and organizations as changemakers.”

Emergent learning is a game changer that can continuously energize individuals, teams, and organizations as changemakers. By engaging us in challenging our strategies, practices, and underlying assumptions, this mindset empowers us to be willing disruptors, to dismantle systemic inequities, and ultimately to transform the sector and the communities we all serve. ▲



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Creating Spaces Where Emergent Learners Can Thrive

Emergent learning urges new ways of thinking. It encourages experimentation, embraces missteps, and values all voices as essential steps in the journey toward transformative impact.

But of course, it also challenges the status quo—meaning it can be an uncomfortable approach for any organization that's relied on traditional learning structures.

So how do we envision the workplace to make it a safe, nurturing, and vibrant learning environment? In this section of our emergent learning playbook, we've distilled answers to that question from across the PEAK community. Alongside, you'll find contributions from your peers, each sharing a page from their own playbooks for making the change to a new and more impactful model of learning.

We hope their insights will equip and inspire you to champion this critical shift in your organizational culture. Because once we open ourselves to the power of emergent learning, who knows what transformative practices we might discover?



When All Are Welcome, We Can Do Great Things Together

By Traci Johnson

No one person has all the answers. The problems we set out to solve, and the change that we seek to create, are not a one-person or even a one-foundation job. What drew me to The Pittsburgh Foundation was their values: accountability, collaboration, community, racial justice, and trust. The foundation works to create a culture of collaboration internally and externally by fostering an environment where staff and community members feel psychologically safe and are given a sense of belonging. This environment prioritizes well-being over position and status. It centers humanity and allows us to bring our authentic selves to the work and to freely share ideas.

“This environment prioritizes well-being over position and status.”

The foundation creates psychologically safe environments by centering humanity at the start of our meetings through check-ins. This can be as simple as asking, “What is your favorite summer activity?” or “If you had your own business, what would it be and why?” The foundation also offers opportunities for staff to lead short discussions on topics that they are passionate about. Also, leaders are encouraged to offer and frame feedback and constructive criticism as a space for growth, discovery, and new opportunities. Each staff member is included in creating an environment free from fear and retaliation.

To cultivate a culture where everyone can freely contribute, we must be creative. We have all been in meetings where the same three or four people dominate the discussion, leaving more introverted personalities out. Sending out agendas or pre-work ahead of time provides introverted and reflective team

members time to prepare responses and additional questions. Using tools that leverage anonymity cedes power to the team without the fear of retaliation, and are useful for individuals who struggle with social anxiety. I love tools like Jamboard, MURAL, and Mentimeter. These tools not only exercise our creativity and yield greater engagement from participants, but they are effective for people who have different styles for learning and engaging.

We must also be willing to intentionally break down silos in our work. At the foundation, we utilize cross-departmental working groups and honeycombs to facilitate collaboration and create opportunities to contribute ideas. Just as honeycombs' hexagonal wax cells contain stores of honey in nature, we have formalized groups that contain members from multiple departments to facilitate and advance work in specific areas such as public policy. This intentional collaboration has expanded my thinking and perspective, allowed me to vet ideas, and has provided a safe space to seek help when I need it.




As a director, I participate in our foundation's leadership team, where directors can update one another on the activities of our respective departments, ask for and give support, and take on foundation-wide projects as needed. Working in this group has been a rich source of insight. I have been able to understand how metrics and measures impact other departments and what other departments need to make measurable progress toward goals. It also has allowed me to think about further streamlining our processes.

The work of philanthropy can often be a huge puzzle with a million scattered pieces. We need emergent learning cultures where everyone's contributions are included, because we never know who holds the missing puzzle piece. ▲


Traci's Playbook

- Create a culture of psychological safety.
- Embed compassion and empathy throughout your work.
- Cede power by leveraging tools and ways of working that engage all minds.
- Break down silos and work interdepartmentally.

Traci Johnson (she, her) is the director of grantmaking at The Pittsburgh Foundation. In addition, she cochairs PEAK's Small Foundations Affinity Group and is a member of the 2022 Leadership Summit Planning Committee.



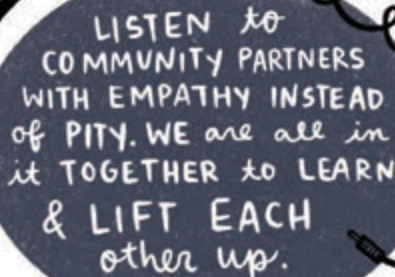
WHAT QUALITIES DEFINE an ORGANIZATIONAL CULTURE that SEES MISTAKES as an INTEGRAL PART of LEARNING and GROWTH?




FOCUS on LEARNING from CHALLENGES INSTEAD of HARPING on the FACT that it HAPPENED.



FRAMING failure STORIES as SUCCESSES in TERMS of LEARNING would MEAN we'd be MORE LIKELY to PRESENT new ideas & PILOT their PERFECTIONISM does not SUPPORT a GROWTH MINDSET.



LISTEN to COMMUNITY PARTNERS WITH EMPATHY INSTEAD of PITY. WE are all in it TOGETHER to LEARN & LIFT EACH other up.



ADMIT MISTAKES OPENLY, DISCUSS what HAPPENED without DEFENSIVENESS or SHAME & WORK COLLABORATIVELY for RESOLUTIONS to PREVENT it FROM HAPPENING AGAIN.



LEADERSHIP NEEDS TO BE OPEN TO CHANGE, EVEN WHEN it REQUIRES SHIFTING STRATEGY, and CELEBRATE STUMBLING by MAKING time to REFLECT on THOSE MOMENTS.

REINFORCE PEOPLE WHEN THEY TAKE RESPONSIBILITY FOR THEIR MISTAKES. IF PEOPLE are NOT COMFORTABLE BEING HONEST with their BOSSES, EVEN THE BEST CULTURE WILL BE STYMIED.



CREATE SPACE & GRACE FOR ALL to be VULNERABLE- INCLUDING LEADERS.



TRYING to get it RIGHT the FIRST TIME can INHIBIT the POSSIBILITY of NEW PERSPECTIVES. THERE'S a RIGHT way to be WRONG: WITH CURIOSITY, CARE & BELIEF in ONESELF & OTHERS.



Making Space for Emergent Learning

By **Ericka Novotny**

In the words of twentieth-century philosopher Paulo Freire, “Learning is a process where knowledge is presented to us, then shaped through understanding, discussion, and reflection.”

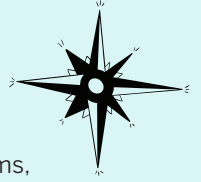
The ability of a group to learn lies in the connection between individual and organizational learning. Grantmaker organizations should create a space so that individuals have opportunities to share their learning with others in a generative and productive way. This type of reflective collaboration will provide the opportunity for funders to better understand what has happened and what needs to happen. Funders need to be able to make sense of the issues faced by our grantees and their movements, share reflections and insights, and adjust course accordingly.

Where do organizations start? Emergent learning must be a set priority and a guiding principle, woven into the cultural fabric of grantmaking organizations. Developing a culture of learning begins with the most senior leaders and a direction-setting perspective. Healthy organizational cultures can make a positive impact on learning—this is possible when values, principles, and norms are consistent with the processes and practices in place to capture, store, and apply knowledge and insight.

Successful emergent learning environments can develop on the organizational, team, and individual levels, and are then cultivated throughout the organization. Developing organization-wide systems and practices better connect staff to the organization’s mission, values, and vision. At the Arcus Foundation, we have been intentional in establishing ways to do this, which include increasing cross-functional collaboration, conducting after-action reviews, and using a more transparent approach to sharing information and data across the organization.

A collaborative mindset is important to team learning, reflection, and sharing. Team leads need to set the tone and intentionally create space for informal and formal learning such that all staff want to participate. For example, having the team read a sector article and share their perspectives is a structured (formal) exercise, while reserving time on a weekly meeting agenda for colleagues to share anything of interest would be more spontaneous (informal). Both contribute significantly to team learning.

Individuals need environments where they are comfortable learning and where their learning is valued. Organizations need to make learning opportunities clear and to put in place tools, systems, and practices that model learning and knowledge building. The north star to aim for is having all staff members develop a growth mindset and behave as contributors at all learning levels throughout the organization. We are still working towards this at Arcus, but we are committed to supporting staff and acknowledging the iterative nature of this construct.



“We need strong cultures of learning across the philanthropic sector—the impact we make is happening at the speed of our learning.”

The world is unpredictable and ever-evolving. We need to be able to adapt to changing landscapes. We need to be prepared and position ourselves to best respond to the needs of grantees. We need to demonstrate the value of individual contributions to our work. We need to listen, reflect, and adapt. We need to solve problems in productive and efficient ways. Ultimately, we need strong cultures of learning across the philanthropic sector—the impact we make is happening at the speed of our learning. ▲

Ericka’s Playbook

- Develop practices that connect staff to the organization’s mission, values, and vision.
- Utilize different learning methods to include everyone.
- See yourself as a valuable contributor.
- Create space for informal and formal learning.

Ericka Novotny (*she, her*) is senior director, grantmaking effectiveness, at the Arcus Foundation. She is also a member of PEAK’s Impact Assessment Tool Working Group and a former member of PEAK’s board of directors.



How Do You De-Silo Learning?

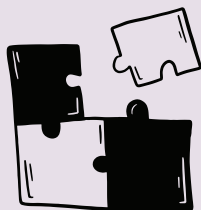
By Abigail Osei

Organizations can inadvertently create the illusion that learning is more important for certain roles. Grants managers might get caught up in this illusion because they frequently feel disconnected from the organization's strategy, and because there's little to no acknowledgment of how the role, as a strategic asset, is reinforced through the continuous process of emergent learning.

How to fix this? First, accept the fact that moving the work forward requires everyone's contributions, from the most seasoned senior employee to the newest staff member.

Next, share knowledge to see where you fit in your organization's ecosystem. When we share our processes and our whys with staff members outside of our immediate team, it creates a space with fewer misunderstandings. We can better see why specific workflows or practices are in place as well as the rationale behind requests. There is great value in ensuring more staff have a well-rounded understanding of the work from various perspectives, rather than everyone remaining a specialist without diversity of thought. Sharing opens the door to effective, internal communication.

An organization is like a giant puzzle. Each person, action, and process is a piece that's needed to create the picture. For the puzzle to be completed, you need to know where the other pieces are and what they look like. Continuously ask the following questions to develop and maintain your understanding of yourself, your team, and others: What do you do? Why do you do it that way?



“An organization is like a giant puzzle. Each person, action, and process is a piece that's needed to create the picture.”

For example, when The Starr Foundation wanted to move to a cloud-based grants management system, a long, collaborative process ensured that we selected a system that would address the critical needs of every department. Because we had a preexisting, de-siloed learning culture, staff members had a basic understanding of others' roles, which drove inclusive innovation and enhancements.

Organization leaders de-silo learning by normalizing mistakes in order to create psychological safety. When I started ten years ago, I almost mailed a grant to Asia instead of three states over. I was so scared when I realized my mistake. Running downstairs, I waited for the building's mail carrier, who went through all the envelopes with me until we found mine. I created a new label and sent the check to the right organization. Months later, when I could finally bring myself to talk about what happened, I was told, “We all make mistakes. You caught it, and you fixed it. Besides, we have things in place to figure these things out.” The conversation continued with Florence Davis, president of The Starr Foundation, who shared stories of the mistakes made over the foundation's decades-long history. Her words put me at ease.

Acknowledgment of human fallibility makes a difference in the organization's culture. I now see the ease with which newer staff share mistakes and ask questions.

Finally, as you find resources and gain field-wide insights, think about how they can be applied outside your role. Share with someone, with a few people, or with the organization. The more individuals share what they are learning, the more others will share in turn.

So let's share the knowledge, pain points, and thought processes with our colleagues and position our organizations to make sustainable, appropriate, and timely changes. As the Twi proverb goes, “Wisdom does not reside in one person's head.” ▲

Abigail's Playbook

- All people, regardless of position, make equally important, valuable contributions to the success of the organization.
- Share success stories as well as failures.
- Sharing what you learn benefits everyone.

Abigail Osei (she, her) is the assistant vice president of The Starr Foundation. In addition, she was a member of PEAK's 2022 Leadership Summit planning committee.

WHAT PREVENTS ORGANIZATIONS FROM LEVERAGING WHAT THEY HAVE LEARNED TO IMPLEMENT PRACTICAL CHANGE?

NOT HAVING A DESIGNATED PERSON OR GROUP FOCUSED ON CHANGE MANAGEMENT CAN PREVENT STAFF FROM REVERTING BACK TO OLD WAYS OF WORKING.

SOMETIMES WE CONTINUE TO COMPLAIN ABOUT AN ISSUE RATHER THAN MOVING TO THE SOLUTION, THERE CAN BE TOO MUCH COMFORT IN STICKING WITH THE FAMILIAR.

WE DON'T ALWAYS ARTICULATE THE RATIONALE FOR CHANGE. WITHOUT THAT CONTEXT, CONFUSION & OUTRAGE ABOUND.

WHEN THERE'S A LACK OF PLANNING FOR CHANGE, WE END UP WINGING IT INSTEAD OF THINKING ABOUT THINGS PROGRAMMATICALLY OR SYSTEMATICALLY.

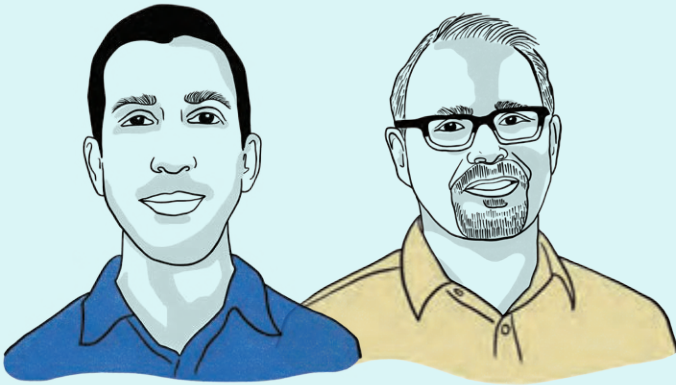
TOO MUCH FEAR & RESISTANCE TO THE FACT THAT IMPLEMENTING CHANGE REQUIRES CHANGING SYSTEMS.

LEADERSHIP & THE BOARD SAY ONE THING BUT DO SOMETHING ELSE WHEN IT IS TIME TO IMPLEMENT CHANGE.

WHEN WE CHANGE OUR POLICIES, SYSTEMS & ORGANIZATIONAL CULTURE ALL AT ONCE, WE RUN INTO CHANGE FATIGUE & HAVE TO JUST ACCEPT IT & KEEP GOING.

THE WORK OF PRACTICING CHANGE TAKES PLACE ON MANY LEVELS & ALONG MANY TIMELINES. MOVING TOO QUICKLY TO OPERATIONALIZE WILL SLOW DOWN IMPORTANT WORK TO EMBED CHANGE.





Learning Cultures Are Built on Trust

By Ben Liadsky and Andrew Taylor

Successfully learning from a grant report requires carefully cultivating strong external relationships based on trust. Whether these relationships are with applicants, grant recipients, intermediaries, or community members, the networks and relationships that organizations develop can often bear fruit in sometimes unexpected ways. For example, relationships with community members can help a grantmaker stay grounded in the issues facing that community, get different viewpoints, maintain an understanding of what the best solutions might be, and understand the impact of those solutions.

Creating the conditions for honest and thoughtful dialogue allows a grantmaker to partner with other stakeholders on an emergent learning journey and better understand the impact of their grantmaking. Here are a few tips that may help to accomplish this.

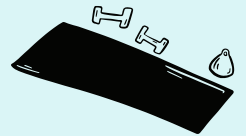
Be transparent about your own learning journey. As Paloma Raggo noted in her research on accountability, “When you hold power, what you decide depends on what you believe you are accountable for.” Accountability for learning starts by defining your learning goals using specific statements that are closely related to the mission of the organization. They may be externally or internally focused, as long as they help to guide organizations and maintain focus on the process, not just the end state. For example, “reducing youth homelessness” is an outcome. “Developing meaningful ways to engage youth that inform our decision-making processes and work” is a learning

“Sharing your learning journey with external stakeholders creates accountability and clarifies what you prioritize, and why, beyond your funding priorities.”

goal. Sharing your learning journey with external stakeholders creates accountability and clarifies what you prioritize, and why, beyond your funding priorities. It can also provide important context that might change how your partners engage with you.

Talk with organizations—whether they are grantees or not—about what you hope to learn together. Learning is a two-way process. One way for funders to start building trust and center learning with organizations is for the two to share their thoughts with each other transparently and to discuss where alignment does and doesn't exist. Funders can initiate this at the beginning of a new funding relationship or incorporate it into an exploration process for a new project. Simply asking “What can we learn together?” creates space for organizations to share their thoughts about what they don't yet know and their predictions for where things might go wrong with their project.

Build your learning muscles. Building a strong culture of learning takes skill, effort, and time. Competencies like active listening, asking questions that go beyond determining what happened, and synthesizing information from different sources can help get to the heart of a matter. Creating the organizational infrastructure for learning can involve creating virtual and in-person spaces for dialogue, protecting time for reflection, and rewarding those willing to share mistakes. Sometimes the most profound insights come from learning about what went wrong, but people don't often feel comfortable sharing failures. To help overcome this, approach the situation with a continuous learning mindset. Offer strategic advice, facilitate connections to a broader network, or provide technical assistance to help an organization or individual achieve their learning goals. Being clear about how the lessons learned are valued, and how they can help inform future actions, is one way to empower people to see their potential in contributing to positive change. ▲



Ben and Andrew's Playbook

- Share what you want to learn and why it's important.
- Ask questions that make you think, check assumptions, and build relationships with external partners.
- Be intentional in how you create space and opportunities for reflection and sharing.

Ben Liadsky (he, him) is a research consultant at Taylor Newberry Consulting. **Andrew Taylor** (he, him) is the founder of Taylor Newberry Consulting.



How to Enable a Sustainable Emergent Learning Culture

By Shantelice White

I have intentionally taken thoughtful risks in my career that helped me to evolve in my craft and ignite my passion for social and racial justice. Aligning myself with organizations that have a culture of learning, and embracing the messiness of exploration, have been critical to my growth. As I reflect on the ways my favorite organizations embraced emergent learning, three themes arise.

“When we begin to feel responsible for the well-being and success of one another, we develop profound connections that propel our learning.”

See yourself as a part of a larger ecosystem. Every team member needs to see themselves as part of a greater ecosystem intended to create sustainable impact. When we begin to feel responsible for the well-being and success of one another, we develop profound connections that propel our learning. In one membership-based nonprofit organization in Washington, DC, we mastered the science of group behavior and used project teams to complete our work. We were constantly reminded of the importance of each role and how we were dependent upon each other. This connection produced a commitment to push our learning to be more responsive to our communities' changing needs.

Adapt to change. In that same Washington, DC nonprofit, the cross-functional nature of our teams enabled us to provide feedback to each other regularly and rapidly. As we

evaluated our progress against milestones and compared data and insights from external stakeholders, we discussed when changes should be made to our work plan. If one person made a change, they would collaborate with other team members to confirm that the change did not have any unintended consequences for stakeholders. If it did, we would work together to fix the issues. For me, as a manager implementing a new system, that sometimes meant reconfiguring the coding of our external-facing platform. Getting regular feedback from my peers and our community helped me to understand the consequences of our actions and deepened my understanding of my craft. Maintaining my individual growth mindset was critical to sustaining our organization's emergent learning culture.

Psychological safety anchors a culture of freedom and responsibility. The root of freedom and responsibility, and what supports an emergent learning culture, is psychological safety. It suggests a sense of empowerment, shared decision-making, active reflection, and accountability. My very first professional experience at an economic development nonprofit provided me with space to make meaningful decisions in my role. The leaders also eliminated repercussions for challenging old ways of thinking and trying new approaches. I basked in the freedom to experiment. My grand ideas were not always successful. Some were flat-out failures. The first board retreat that I coordinated was horrific: Nothing went as planned, and board members left feeling that they were not able to meet their goals. Fortunately, leadership did not penalize me for making mistakes. They did, however, expect me to fix the issue and make sure that it did not happen again. The following year, we crafted a new approach that would engage and excite the board, and the event was a beautiful success. Leadership emphasized the learning that emerged from the mistake, not the shame of imperfection, and gave me the freedom to grow in my role. ⚓



Shantelice's Playbook

- Understand how each role (including your own) helps to create impact.
- Embrace the learning that can come from failure.
- Own success and falling short, and adapt accordingly.

Shantelice White (*she, her*) cochairs PEAK's Black Caucus and previously served as director of grants management at a private family foundation based in Bethesda, Maryland. She is a guest editor of this issue of PEAK Grantmaking Journal.

WHAT ORGANIZATIONAL SHIFTS ARE NEEDED TO FOSTER BETTER LEARNING ENVIRONMENTS?



VALUE PROCESS OVER PRODUCT, *belonging* OVER COMPETITION & CONSISTENT INVESTMENT IN THE ORGANIZATION'S CAPACITY FOR REFLECTIVE PRACTICE.

BUILD *learning* INTO THE CORE & IN EVERY CORNER OF THE ORGANIZATION, BUILD *time* FOR LEARNING & DEVELOPMENT INTO *the* 40-HOUR WORKWEEK.

TRUST employees to MAKE MORE DECISIONS as they RELATE to their JOBS.



LEADERS need to be MORE OPEN about WHY RISK & TRYING *new things* ARE OKAY, & TALK ABOUT *their own* MISSTEPS. THIS WILL LOWER STAFF ANXIETY & POTENTIALLY, INCREASE MORALE.



MANAGERS SHOULD INVITE *regular*, TWO-WAY FEEDBACK *conversations* RATHER THAN WAITING UNTIL *the* ANNUAL PERFORMANCE EVALUATION to MAKE ROOM FOR INDIVIDUAL LEARNING.



HAVE THE COURAGE to be RADICALLY CANDID about INTERNAL DYNAMICS INCLUDING *where* *the* ORGANIZATION'S ACTIONS & VALUES do not ALIGN & why it STALLS in IMPLEMENTING CHANGE.

BUILD IN GREATER ACCOUNTABILITY FOR IMPLEMENTATION & COMMUNICATION engagement.



LISTENING to PEOPLE FROM THE COMMUNITIES WE SERVE IS WHEN WE ACTUALLY learn. BUILD RELATIONSHIPS with GRANTEES that are NOT BASED on our NEEDS, but FOCUSED on CARE & COMPASSION FOR COMMUNITIES.



DIVERSIFY the EXPERTS you INVITE to the TABLE.



DEVELOP an AWARENESS of DIFFERENT LEARNING STYLES.



MAKE ROOM FOR BRAINSTORMING & DISCUSSION. MAKE SPACE FOR STAFF to BUILD RELATIONSHIPS, Co-own PROJECTS & SHARE CONCERNS. HOLDING these SPACES ALLOW US to MAKE REAL CHANGE.

TRUST your TEAMS TO BE TEACHERS & learners. HUMILITY GOES A LONG WAY TO BUILD ORGANIZATIONAL culture.

IT BOILS DOWN to RESPECT, PATIENCE, KINDNESS, ACCEPTANCE & APPRECIATION. When I feel VALIDATED, I FEEL MORE FREE to LEARN, SUGGEST IMPROVEMENTS & TAKE ON CHANGE MANAGEMENT PROJECTS.

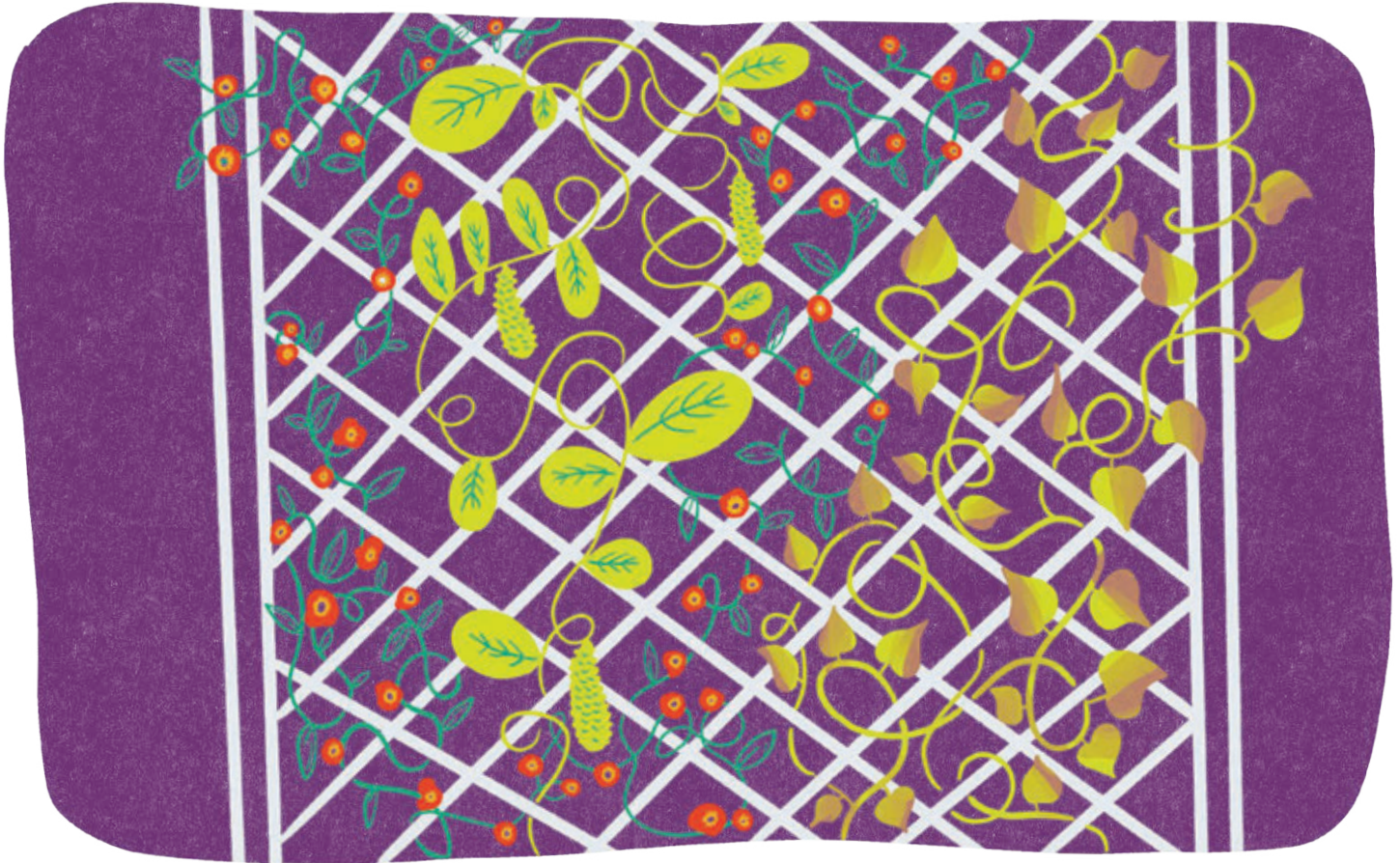


LEARNING HAS to be seen & PRIORITIZED as a CRITICAL lever for the ADVANCEMENT of STRATEGY, PERFORMANCE, & IMPACT. LEARNING CANNOT BE A PART of culture if it SITS to the SIDE.



SEEK INPUT FROM a VARIETY of PERSPECTIVES, CREATE A VARIETY of WAYS FOR PEOPLE to ENGAGE & THEN USE THEIR INPUT.





How Surdna Centers Trust and Learns With Grantee Partners

By Jonathan Goldberg

When foundations seek to improve and assess the impact of their work (and not all foundations do), questions abound. Some look inward, asking: *Does our portfolio of grants support our strategy and intended organizational outcomes? Are we moving the needle? Is our work still relevant in a constantly changing world?* Others grapple with the approach: *Should we focus on learning or evaluation?*

All of these questions are important to the ongoing work of any foundation. But taken alone, they often miss an essential element: the grantees.

Over the years, the Surdna Foundation has developed a culture of learning in service of grantees that has been guided by three fundamental questions: *What can we do, beyond giving grants, to help partners solve societal problems? How can we learn with and in service of grantees to accelerate racial justice? How can we remove barriers and inefficiencies to our processes?* We believe these questions will lead us to better results in the long run. For us, the journey is as important as the destination.

The path to learning together

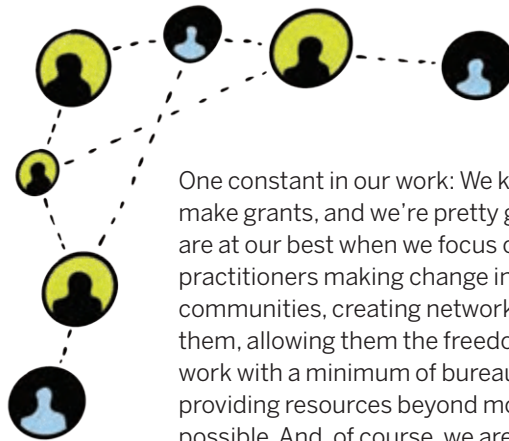
Learning and evaluation aren't mutually exclusive. Both offer accountability and continuous improvement. But the words themselves are loaded.

For some, *evaluation* connotes a sense of objectivity with clear, data-driven results. To others, it implies that foundations are judging grantees for hitting predetermined metrics, as though grant outcomes were sales quotas. *Learning*, on the other hand, can feel more approachable and open to ideas that transcend metrics—or it may seem like a soft science, lacking in rigor. Most foundations choose their approach based on philosophy, organizational culture, and, to a lesser extent, the nature of the issues a foundation is working to improve. For example, a quantitative evaluation process might be better suited to the work of a funder trying to determine the efficacy of a drug trial than one working on racial justice. But most funders can benefit from hard and soft data alike.

Finding our comfort zone in terms of measuring our progress and impact has been a long and winding path, and not without some potholes along the way. Though we all agreed that accountability and improvement are important, there were competing tensions about how best to approach measurement, including different opinions about using (presumably objective) data, fear of how the data will be used (“Is the data being used to judge my work?”), how the data might affect future funding decisions or program strategies, and even questions of who should have the power to make these decisions.

There have been a number of well-intentioned but ultimately failed approaches to measuring success over the years. So what were we missing? In all of these efforts, we overlooked three things: centering and giving voice and power to grantees, clearly articulating why measurement mattered to us, and building trust and buy-in between program staff and management.

“We are at our best when we focus on identifying practitioners making change in their communities, creating networks of support for them, allowing them the freedom to do their work with a minimum of bureaucracy, and providing resources beyond money whenever possible.”



One constant in our work: We know how to make grants, and we're pretty good at it. We are at our best when we focus on identifying practitioners making change in their communities, creating networks of support for them, allowing them the freedom to do their work with a minimum of bureaucracy, and providing resources beyond money whenever possible. And, of course, we are committed to distributing funding effectively and efficiently, and supporting our grantees to do their work to the best of their ability.

Following the outset of the pandemic, Surdna and many other funders leaned further into trust-based philanthropy, a sort of philanthropic Hippocratic Oath—“first, do no harm”—that has been gaining traction in recent years. This long-overdue shift caused many foundations to do away with nonessential grant reports and other paperwork, give greater general-operating and multiyear support, require fewer grant reports, and streamline their grantmaking processes.

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

One interpretation of trust-based philanthropy is the idea that we should make the grant and get out of the way. Despite the sector's self-flagellation for bad practices, there are a lot of smart, hard-working, caring people in the foundation world, including many who spent years working in the very fields they now support. They can—and do—provide a lot of resources to our grantees beyond the grant, including sharing their knowledge. These two questions remain: What do our grantees need to grow and learn so they can continually improve their effectiveness? And, how can foundations support their learning journey?



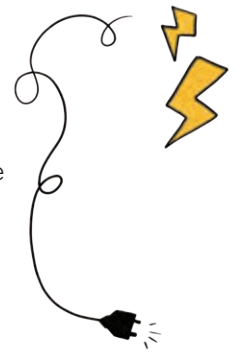
Sharing knowledge, impact, and lessons

Working at the intersection of trust-based philanthropy and shared learning for the past few years, we've come to a few conclusions about what works well and what doesn't.

First, creating vehicles for listening, learning, and power-sharing leads to trusting relationships with our grantee partners, and helps to create the conditions for collaborative learning. Here are some examples that we have found to be particularly effective:

- **Town halls.** While our programs have always connected grantees with each other through conferences, convenings, and calls, we have formalized hosting virtual town halls throughout the year. During these meetings, program staff and grantees share information about their work, fields of interest, challenges, and how Surdna can be most helpful, providing real-time feedback and deepening trust. These forums also play a vital role in connecting grantees for knowledge sharing and in holding ourselves accountable to grantee partners.
- **Learning cohorts.** Currently, a pilot program of our Inclusive Economies Program, the learning cohort convenes a group of seven to ten grantee partners to foster relationships and build projects together in ways that elevate insights to the entire portfolio of grantees and the field. Participants will receive a stipend as well as a grantmaking budget to recommend funding for projects that the foundation could not do on its own. We will evolve the program as we learn more.
- **Anonymous feedback.** The largest effort for obtaining honest feedback is our participation in the Center for Effective Philanthropy's Grantee Perception Report. Of course, feedback is only as good as our willingness to make changes based on the findings and to share the results with transparency—good and bad. For example, in our recent Grantee Perception Report, our grantees noted that we could be better at communicating clearly, consistently, and more responsively. As a result, we have taken several steps to address those concerns, such as providing better descriptions of our programs and strategies through our website, and communicating proactively with grantees through a new newsletter.
- **Participatory grantmaking.** Efforts to transfer power to those closest to the problems Surdna aims to remedy have produced new ideas, solutions, and insights from which everyone can benefit. Two examples are the Visionary Freedom Fund and the Amplify Fund. The former was launched by the Andrus Family Fund (a part of Surdna) to strengthen the conditions necessary for youths who identify

as Black, Indigenous, or a person of color to thrive. The latter is a national, place-based, pooled fund that allows communities to have a more powerful voice in the community development decisions that directly affect them. Both funds ensure that movement partners are at the decision-making table.



“Efforts to transfer power from the foundation to those closest to the problems Surdna aims to remedy have produced new ideas, solutions, and insights from which everyone can benefit.”

Our second insight is that data is essential to learning, but it must benefit grantees as well as funders. We need to give grantee partners and other stakeholders a seat at the table when deciding what data to collect and how it will be used to understand progress toward our collective goals.

Metrics and indicator data are for learning, not judging.

Together with grantees, we determined what outcomes we are aiming for, what we need to know about the progress of grant activities, which field-level indicators matter, and, above all, how that information can be used to help grantees, not judge them. To that end, we invited grantees to engage with us to codevelop our program outcomes and strategies, compensating them for their time, and then spent the better part of a year determining the data that mattered the most for tracking the wins, challenges, and lessons along the way.

Sharing is caring. The metrics and field-level indicators we collect (both quantitative and qualitative) don't go into a black hole the way so many grant reports traditionally do. Instead, our staff compiles and analyzes the information, looks for insights and trends, and then shares what we've learned with grantee partners. These learnings can inform our feedback loops, such as the town halls and learning cohorts mentioned above, and areas we need to emphasize in our programs.

Data informs support beyond the grant. Alongside efforts to streamline the grant application and reporting process, we are looking at ways to use this information to provide support beyond the grant. For example, we recently changed our grantee financial review process, relying on publicly available documents for the bulk of grant applicants rather than customized budgets. With tools developed by Surdna and BDO FMA, we automated our financial review process, saving a lot of time for Surdna staff and for grantees, most of whom no longer need to provide any financial information. Instead, we spend our time on the organizations who need our help. Rather than disqualifying organizations that may be facing financial headwinds, we offer 1:1 financial planning consulting through

BDO FMA, or a financial consultant chosen by the grantee, at no cost to them. An additional benefit of the tools we developed is that they provide us with data we can use to measure the financial health trends of our grant portfolios, helping us understand whether Surdna's grantees are becoming more or less financially stable over time.

Based on the early success of this program, we have launched the Resilient Organizations Initiative, which offers a suite of capacity-building tools that grantees have asked for, including fundraising and technology planning, with expansion into other areas in the future.

The most important element is trust!

While we could attempt to devise a learning system based on irrefutable data, the result would likely be a costly combination of information designed to serve specific purposes, missing context, and a set of top-down, extractive relationships.

“By entering into trusting relationships between the foundation and our partners in the nonprofit sector and philanthropy, we will make steady progress, learning along the way what works and what doesn’t.”

Will we reach a point where our learning provides incontrovertible proof that our grants will achieve the lofty outcomes we set out in our foundation's mission and program strategies? Not any time soon. Both our grantees and Surdna will make mistakes, fail to anticipate changing landscapes, and need to reconsider which data matters from time to time. But we will be better informed than we were before, and it is our intention to help our grantee partners be better informed as well. By entering into trusting relationships between the foundation and our partners in the nonprofit sector and philanthropy, we will make steady progress, learning along the way what works and what doesn't. And that will benefit us all. ▲



Jonathan Goldberg (he, him) is the director of learning and grant operations at the Surdna Foundation and a former member of PEAK's board of directors.

Surdna's Inclusive Approach to Learning

In phase one of a new pilot program, the Surdna Foundation's Inclusive Economies and Learning Grants Operations teams joined with a dedicated group of grantee partners to cocreate a set of metrics and indicators that measure progress toward collective goals.

Measuring Together: A Learning Approach for Inclusive Economies reports on key takeaways from the first year:

- **Measurement for learning; not proving impact.** The pilot focused on establishing a system for learning, rather than evaluating whether grantee partners reached their targets.
- **Timing matters.** This pilot coincided with the pandemic and influx of temporary federal dollars, illustrating that while the snapshot of learning around these metrics is important, we need to look at a long arc of data before we can make conclusions about field-level impact.
- **Economic narrative change is an emerging theme.** Several organizations reported on narrative change work, highlighting issues such as preemption, fair wages, and working conditions.

Read the report at surdna.org/measuring-together

A CANDID Conversation about how to DRIVE INNOVATION & IMPACT



Adopting emergent learning practices can have a transformative effect inside organizations by creating a sense of agency that empowers people to lead from their seats to challenge the status quo and encourage innovation. But even organizations eager to embrace change may find it difficult to move forward with charting new territory. That's where the interdisciplinary mindset of Candid CEO **Ann Mei Chang**, developed through a career steeped in Silicon Valley, is invaluable to the social sector.

In conversation with PEAK's **Satonya Fair**, Chang shares her unique perspective on reenvisioning how philanthropy operates by adapting methods used in the tech sector to drive innovation and impact. Together, they explore the imperatives of reframing risk, embracing iterative learning, and engaging disparate voices—ultimately rebalancing power and creating true partnerships between funders and nonprofits.

Fair: We always have to battle against this notion of doing things the way they've always been done and the anxiety around change. That's why I hope this conversation will activate others to start thinking about innovation and emergent learning in different ways. As a historically rigid field—and I hate to say that, but I think we are—what might philanthropy learn from organizations that center innovation?

Chang: Think big. If you don't take a big swing, you're unlikely to end up doing something transformative. For our sector, that involves placing lots of small bets rather than picking one winner, keeping a laser focus on determining what, ultimately, leads to more impact.



THINK BIG. IF YOU
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ANN mei
CHANG

The problems that we're facing in the social sector are getting bigger and more complex, and our solutions just aren't keeping up with them. It's not that we're not working hard: I know there are so many people working themselves to exhaustion. And yet, the problems grow.

In the course of the pandemic, we've experienced lots of tragedy, but it also forced us out of our comfort zones. It gave us an opportunity to develop new muscles—to place a lot of small bets in the relentless pursuit of impact. Now's the time, on both the funder side and the nonprofit side, to get out of our traditional modalities.

What's come out of that? Some things worked, and some things didn't, but we now have a bunch of interventions to carry forward. And I think that there's hope that we can continue innovating.

Fair: Test, iterate, learn, improve, right? I do think we're a little afraid to do that. But change has been happening faster than ever, and this is not an agile sector. How do you see Candid's role in equipping the sector—funders, nonprofits, community-based organizations—to better pivot and respond?

Chang: When we have more context and knowledge, we can make better decisions and we can learn more quickly. I see Candid's core role in the sector as helping us all share data and be more efficient with sharing—not sharing the same data a hundred times over in slightly different ways, but coalescing data in a way that's meaningful for everyone. That's really the foundational part of learning.

For example, one of our major initiatives is a demographic data campaign called Demographics via Candid, which empowers nonprofits to share data in a form that can be used by others. We are seeing so much demand across the sector for understanding demographics, DEI, and racial equity. Funders are bombarding nonprofits with requests for demographic information, but using different slices, or different categories, so that they have to collect the data over and over again. It is vastly inefficient for the sector.

By collating that data and making it freely available, the sector can start to understand what the problems look like and where the marginalized organizations are that need to be lifted up. We can't make a lot of progress if we don't understand where we're starting from.

Fair: How do we get to a place where nonprofits are empowered to tell funders to do better? And how does that feed into the outcomes that you hope to see by 2030?

Chang: Nonprofits need to be able to stand up and ask for things that will help them be effective, and foundations need to be willing to cede power so that the equation works better. So we're working through data with both sides to help in rebalancing power.

We're thinking about a framework that looks at doing the most good across three dimensions. The first is equity. We're not going to be doing the most good if we're not equitable in terms of where the resources go.

The second is effectiveness. Do you have some measure of whether your work is doing good? That could be getting community feedback, or a randomized control trial, or any number of points in between. And do you have a feedback loop that helps you continue to get better?

The third is scalability. I don't think we have the right terminology for this yet, but it's about systems change: Are we just addressing the immediate issues, or are we also investing in changing the system?

Fair: If you take enough steps in the right direction to reenvision your grant practices in service of equity, you get better and better at using data to make decisions. There's so much alignment in your approach. How does Candid approach innovation to learn and push past its own boundaries?

IF YOU TAKE enough STEPS in the RIGHT direction to REENVISION your GRANT PRACTICES in SERVICE of EQUITY, you get BETTER & BETTER at USING DATA to make DECISIONS.

SATONYA Fair



Chang: Innovation comes from the unexpected, from bringing disparate perspectives together, from casting a wide net. The Candid Innovation Fund, for example, invests in ideas that come from our staff—new products, new features, new services, new markets—that we might want to focus on.

Rather than depending on the executive team to come up with “the big thing we should do,” we want to tap into the ingenuity of people across our staff, who all have different perspectives, and who are all closer to the work. Once we place a lot of those small bets and find the ones that have real traction, we can continue to build on them.

INNOVATION Comes from the UNEXPECTED, from BRINGING DISPARATE perspectives TOGETHER, from CASTING a WIDE NET.

ANN mei CHANG

Fair: PEAK is in the same frame of mind. While we don’t have an innovation fund, we’re trying to change the way we work. People have talents, interests, and big ideas, but if everyone is always focused on delivering and being tactical, they don’t have an opportunity to do that blue-sky thinking. And so we are working to be better at that as an organization. On your end, it sounds like you’re in that process of creating an emergent learning culture. What should other leaders, at foundations and nonprofits, be doing to create and nurture similar cultures?

Chang: Of course, our innovation fund is a luxury to have. Innovation is something that is so hard for nonprofits to do because they are often working on a shoestring budget, and with grants that don’t allow them the flexibility to try new things that might not work.

What’s really ironic is that, in the corporate world, investors see a small R&D [research and development] budget and they all short that company’s stock. It says to them, “That company is not investing in the future.” In the nonprofit sector, where R&D counts as overhead, it’s the opposite. I think it’s one of the main reasons that we keep falling behind problems.

Fair: It feels like a chicken-and-egg problem: As a nonprofit, you’re not going to get better at serving communities unless you can be innovative and flexible and think outside the box, but you’ve got to get some money and space to be able to do that. How do we break this cycle?

Chang: Funding is the biggest challenge. Like I said, I’m hopeful because of the commitment to more flexible funding at the beginning of the pandemic. But restrictive funding is the biggest impediment, and because we’ve lived under that regime for so long, it’s baked into our organizational cultures. So we have a responsibility to do things differently. Most breakthroughs seemed crazy when someone first proposed them, so we don’t want to cut ideas off: I think small bets, on a lot of different ideas, is really important.

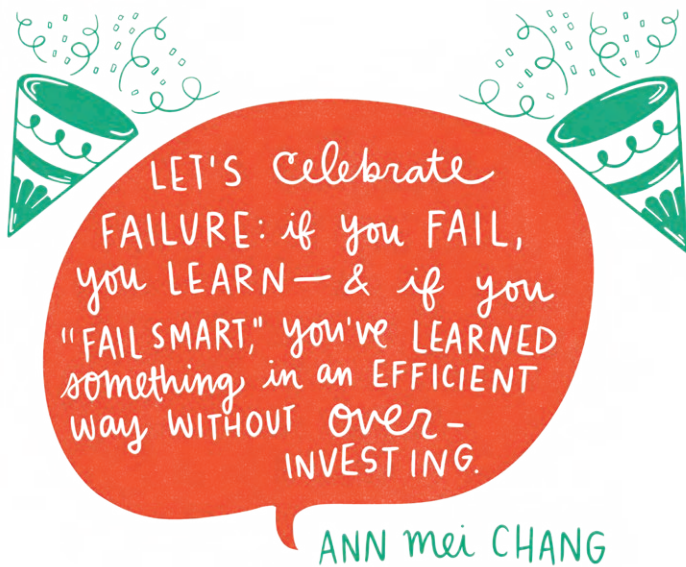
So is setting the expectation that, when we’re innovating, we’re going to fail more than we succeed. In fact, if we don’t feel we’re failing more than we’re succeeding, we’re probably not taking enough risks. Let’s celebrate failure: If you fail, you learn—and if you “fail smart,” you’ve learned something in an efficient way without over-investing.

Fair: I second your “fail more” point. We do battle in this sector with perfectionist culture. People are not comfortable pitching ideas or new ways of working if there’s a risk of those ideas not panning out well.

PEOPLE have TALENTS, INTERESTS, & BIG IDEAS, but if everyone is always FOCUSED on DELIVERING & BEING TACTICAL, they don’t have an OPPORTUNITY to do that BLUE-SKY thing.

SATONYA Fair





LET'S Celebrate
FAILURE: if you FAIL,
you LEARN— & if you
"FAIL SMART," you've LEARNED
something in an EFFICIENT
way WITHOUT Over-
INVESTING.

ANN mei CHANG

Chang: The second thing I think we should do, or do more of, is asking ourselves and each other the hard questions. We're all so mission-driven and so collegial—I love that about the sector. But the downside of that is when we don't do enough to play devil's advocate—asking the hard questions around what might go wrong in order to learn more and make something better.

The third is setting audacious goals, the kind we know we will fail if we continue with business as usual. If your goal is 10 times as much as before, then you need to start thinking outside the box and trying completely different approaches.

Finally, put impact first. We all say this, but we don't all do it. A phrase often used in the innovation community is, "Fall in love with the problem, not the solution." Ultimately, we're here to solve problems, not market solutions.

Fair: How have strategic partnerships informed Candid's strategy, especially now as you're leading the organization in developing new impact models and ways of working?

Chang: Candid partners with over 100,000 organizations who share their data on the Candid platform: nonprofits claiming their profiles or earning a seal; foundations claiming their own profiles, e-reporting, and sharing grants data with us. What makes our data better and richer is our partnership with all these different organizations.

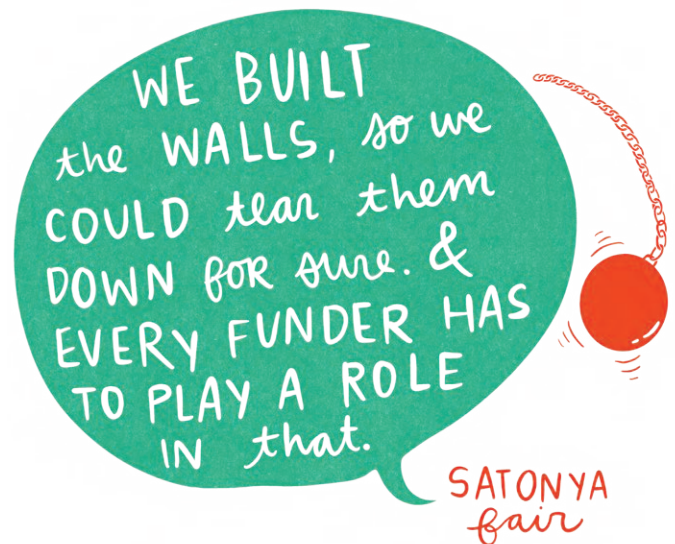
We also have partnerships that are much more specific. We recently launched a multiyear partnership with ABFE, which is leveraging Candid data and ABFE's subject-matter expertise to really help us understand Black leadership in the sector. All of this partner work is very intersectional. We are not the experts on all of these topics, but we have data and a platform to help us all better understand the interconnections and how we can best make a difference collectively.

Fair: PEAK is going into the next year focusing on our Learn, Share, Evolve Principle to advance the emergent learning model, which includes being a change practitioner, leading

from where you are, and being title-agnostic in bringing voices and ideas to the front of the room. We're calling on grantmakers to design practices that promote learning and sharing broadly. What's your call to action for funders to elevate their learning for the benefit of the sector overall?

Chang: Really consider what data you're asking for from nonprofits that others are also asking for, and look at how you can reduce the burden on nonprofits to supply that data over and over again in slightly different ways. Dedicate a full-time staff member or a full-time department to doing that. If the past few years taught us anything, it's that we need to shift the power balance. Funders have to take on more of the due diligence responsibility rather than burden nonprofits with a specialized form to fill out for each funding source.

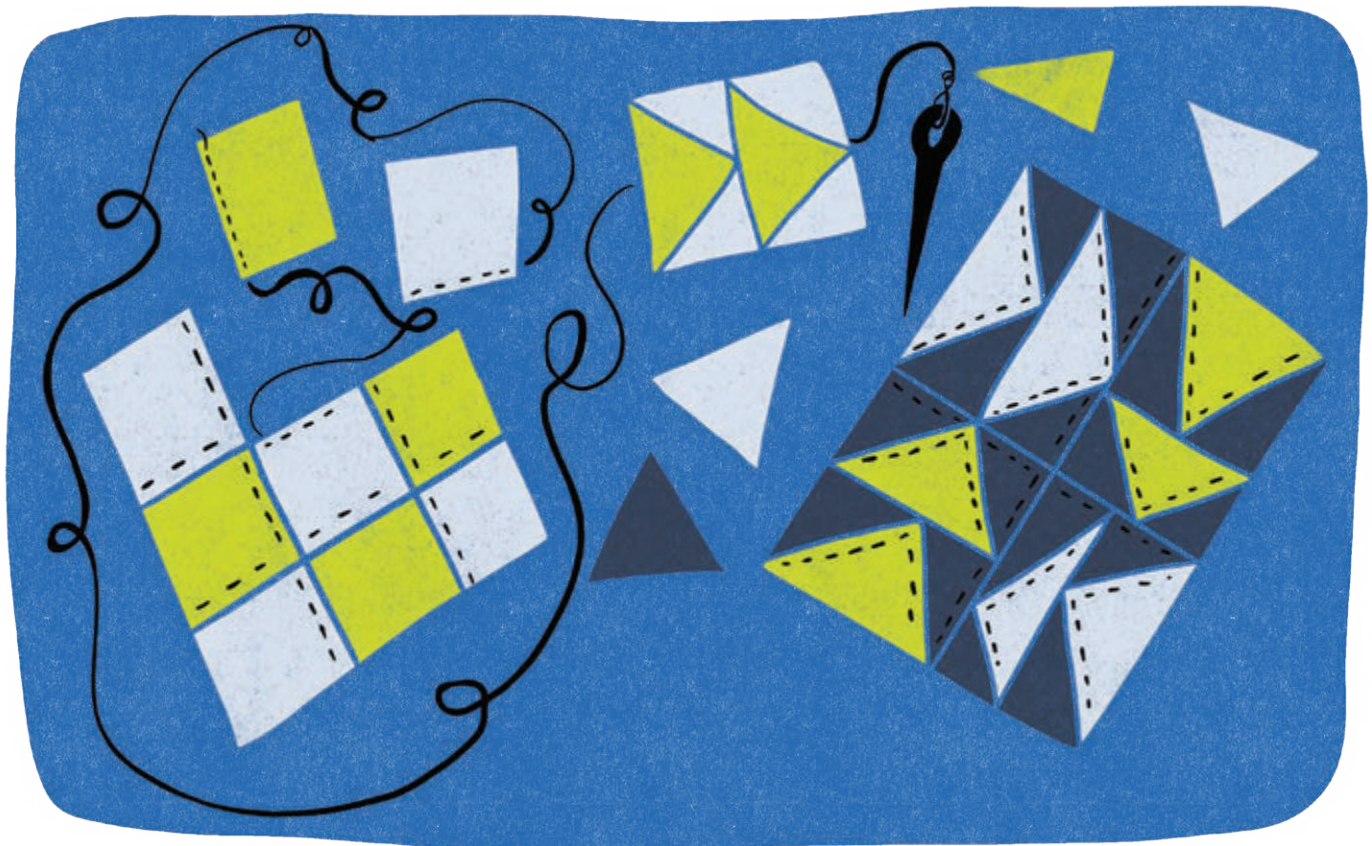
It all comes back to data transparency. We will learn on our own and from each other by gathering data and using it in meaningful ways to make our decisions. Equity is a really important piece of this because access to data is not yet equitable. There are financial and nonfinancial barriers that get in the way of marginalized organizations being able to participate fully. They may not have the expertise to use our tools to their fullest effect, or know how to fundraise using the tools. That's why Candid has a learning agenda to build the capacity of nonprofit leaders to take advantage of these tools.



WE BUILT
the WALLS, so we
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EVERY FUNDER HAS
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IN that.

SATONYA
fair

Fair: We built the walls, so we could tear them down for sure. And every funder has a role to play in that. I have been really excited to see you come into your leadership role at Candid and to see the innovation, the different ways of thinking, and the excitement from the team that has resulted, as well as these new partnerships. We are so looking forward to a future together, working as strategic partners with Candid to advance great ideas and arrive at a place where funders and nonprofits are aligned, and where we can do more and better because we are aligned. ▲



Unlearning and Relearning to Leverage New Grantmaking Models

By **Melanie Matthews**

Philanthropists, in seeking new tools to solve long-term societal problems, are increasingly looking to new grantmaking and structural entities through which to achieve their missions. At one end of the spectrum are private foundations with living donors that establish a 501(c)(4) as a separate but affiliated organization working in similar program areas but using different means and that is able to more fully engage with the political process. At the other end are limited liability companies (LLCs), which employ staff who have access to multiple entities to achieve their work—501(c)(3) public charities, (c)(3) private foundations, donor advised funds (DAFs), and (c)(4)s. Through these entities, the focus shifts from the entity making the grant to the work itself—finding the best way to get the money out the door in a way that supports the change that grantmakers and grantees seek to achieve.

So, how do grants managers adapt to these new models of grantmaking? And how do you learn what you need to know when there is no playbook for multi-entity grantmakers? I asked three longtime PEAK members to share their advice for how to thrive in a new grantmaking environment:

- **Tiauna George**, senior director of grants management at Energy Foundation, a (c)(3) public charity with an associated(c)(4);
- **Kelly Hayashi**, director of grants management at Heising-Simons Foundation and Heising-Simons Action Fund, a (c)(3) private foundation and a (c)(4); and
- **Hannah Kahn**, vice president of data, systems, and technology at Arnold Ventures, an LLC, donor advised fund, (c)(3) private foundation, and (c)(4).

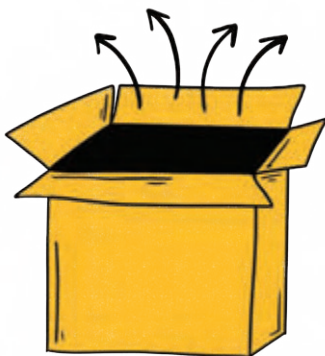
Embracing the philosophy and practices of emergent learning turned out to be key to engaging in multi-entity work, work that is challenging, interesting, exciting, and most definitely worth the effort!

Be curious

If you started in the (c)(3) private foundation space—the most regulated and restricted entity—moving into grantmaking with different entities will require you to unlearn and relearn. Be curious and don't be afraid to ask questions to understand the specific needs of the grantmaking entity. For example, in the (c)(4) space there is so much more urgency than in the (c)(3) private foundation space, so ask your program staff to explain what drives their work. It's easier to get money out the door quickly or follow complex regulations if you understand why.

It's a mindset, not a skillset

Being successful in a multi-entity space requires a certain mindset, not a certain skill set. You need to be nimble, agile, willing to learn, open to new ideas and ways of doing things, and able to think outside the box of traditional grantmaking. Look, for example, to design thinking or other sectors for applicable learnings and solutions. Recognize that you are operating in a different space, acknowledge what you don't know, and use all the tools and sources of information available to you. As Hannah Kahn told me, "It's about an openness, a willingness to embrace new things, to fail, to trust that it's going to be okay, a growth mindset."



“You need to be nimble, agile, willing to learn, open to new ideas and ways of doing things, and be able to think outside the box of traditional grantmaking.”

Definitions of philanthropic entities

501(c)(3) private foundation:

These organizations are exempt from federal income tax. Their donations are tax deductible. In addition, they cannot lobby or engage in political work.

501(c)(3) public charity:

These organizations are exempt from federal income tax. Their donations are tax deductible. In addition, they can engage in limited lobbying but cannot engage in political work.

501(c)(4): These are social welfare organizations that are exempt from federal income tax. Their donations are not tax deductible. In addition, they can engage in unlimited lobbying and limited political work.

Donor advised fund (DAF):

These are charitable investment accounts housed by a public charity. Donors receive a tax deduction for any contributions made. Grants can be made at any time. A public charity provides formal approval for DAF grants.

Limited liability companies (LLCs):

These US legal entities that provide limited liability to their owners and are less regulated than nonprofit entities. They are not tax exempt. In addition, they often act as an employer of philanthropic staff to enable staff to move easily between 501(c)(3) and 501(c)(4) work. LLCs can engage in political work. And unlike DAFs and (c)(3) and (c)(4) organizations, LLC filings are not public.

What's important is that grants managers adapt to the context within which they are working. For example, policy change happens in a dynamic context; your grantmaking needs to reflect that (c)(4) funding often needs to be released quickly. Similarly, if an attempt at policy change fails, program staff simply regroup and try again; grants management staff need to be able to respond in a similar way.

Embrace diverse sources of information

There is no single source of information that will teach you all you need to know, so take a cross-functional approach. Legal conferences like Georgetown Exempt Organizations Conference or the Nonprofit Organizations Institute at the University of Texas are great sources of legal information. Your tax accountants or an accounting conference will have information on tax compliance. You won't understand (or need to know) everything you hear, but you will come away understanding the parameters within which you are working and what might change in the future, and with a network of people you can reach out to with questions in the process.

Being able to lean on others, internally and externally, for their depth of expertise also frees you up to focus on where you can have the most impact. "Philanthropy can be a little bit too clean, too buttoned up, too pristine," Tiauna George said. "When it comes to new models of grantmaking, I'm the anti-compliance grants manager. I don't want to get mired in all of the rules and all of that. That's what I consult a lawyer for."

So talk to your grantees, vendors, consultants, and peers, use Google, go to conferences, and, if you are using a (c)(4), talk to public policy experts to understand the levers of political work. And don't always wait for a work-sponsored professional development opportunity. If you are interested in becoming a (c)(4) grants manager, Kahn recommends personally making a small donation to a (c)(3) and a (c)(4) in an issue area you care about and assessing how each entity used the money and engaged with you.

Look to your grantees

There is knowledge in the nonprofit space. For (c)(4) grantmaking, Alliance for Justice and Bolder Advocacy have excellent resources and you can also learn a lot from, and with, your grantees. Many (c)(4)s are small and have very limited operations capacity, and you will likely be dealing with their program folks—so if you are seeking, for example, a copy of their IRS Form 8976, Notice of Intent to Operate Under Section 501(c)(4), they may not know what you are asking for! This enables you to learn together and build a more equal relationship, one which is often very different from the traditional (c)(3) funder-grantee relationship.

Be vulnerable

Grantmaking in a new structure can be exciting and liberating, but it requires that you thrive in an environment where you can't know everything you will ever need to know.



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George, Hayashi, and Kahn all acknowledged that they will never know and remember everything they need to know. Grantmaking across multiple entities means navigating many different rules and regulations, and (c)(4) grantmaking specifically can be very complex with rules that vary state by state.

No one can know and retain everything so build a space where it is okay to ask questions, make mistakes, and then give yourself grace and move forward.

Trust

Being comfortable asking questions and sharing knowledge cross-functionally and externally requires creating a safe space free from judgment. George, Hayashi, and Kahn all spoke about developing a network of peers to call on and building a cross-functional space internally where staff can come together to learn with and from each other. Heising-Simons Action Fund has a review committee where representatives from program, communications, legal, grants management, and finance come together to talk about new (c)(4) grants. People may ask the same questions again and again, but it's an important space to test how comfortable the organization really is with something and to create the internal culture that Heising-Simons seeks.

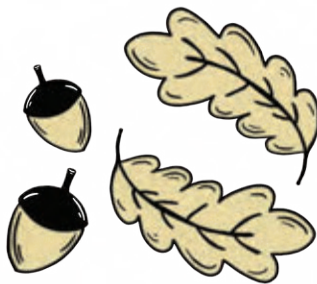


“Being comfortable asking questions and sharing knowledge cross-functionally and externally requires creating a safe space free from judgment.”

Interdepartmental spaces like this also provide an opportunity for grants management professionals to demonstrate their strategic value to the organization. “Grants managers, or even just the operations function in general, sees across the organization in these cross-cutting ways that no one else does,” Hannah Kahn observed. “This is a powerful role we play in our organizations.”

Share

At every stage in your career, seek out your own learning and then share what you know, internally and with others. George, Hayashi, and Kahn emphasized how important it was to find time for reflection that allows for learning and iterating, and also acknowledged the real challenge in finding that time. They highlighted how sharing what you learn, especially when you are learning in a very agile environment, is hard but necessary. Because knowledge management is an equity issue—who has access to knowledge, whose knowledge matters—we cannot ignore the need to share our learning, even if it is hard. It’s worth asking how we could scale our systems for sharing knowledge so that we can be true allies to our partners and grantees. Imagine the impact that would have!



“Ask: How could we scale our systems for sharing knowledge so that we can be true allies to our partners and grantees?”

Just do it!

To unlock the full potential of emergent learning, you may have to create your own learning spaces. “Take action on the change that you want to see happen,” Kelly Hayashi said. “It’s cheesy to say ‘Be the change you want to see,’ but if you want to change the way you present information to your board, then propose it. Everyone has different positional power but often we are the people with the authority to make a change—we just don’t see it.” Have you always wanted to get rid of narrative reports? Try it, learn from the experience, iterate, and move on.

When Heising-Simons Action Fund was launched, Hayashi realized that there wasn’t a network of people working in the 501(c)(4) space and this led to the creation of a peer learning group for (c)(4) grantmaking operations professionals facilitated by BDO FMA, now entering its third year of meeting. Tiauna George suggests coming up with hacks to make your learning journey easier, whether that’s 10 minutes a day spent searching for something that you want to learn more about, registering for a webinar, or reflecting on a recent grant process. Whatever it is, create ways that you can make learning easy.

What was clear as I spoke to George, Hayashi, and Kahn was their engagement with their work. Working with multiple entities is interesting, varied, often exciting, and, yes, sometimes challenging and stressful. But no one longed to return to working for a single private foundation. It seems that once you lift the lid off traditional grantmaking, it’s hard to close it again! ▲

Tiauna, Kelly, and Hannah’s Playbook

- Learn from others, especially your grantees.
- Thriving in a multi-entity grantmaking environment requires the right mindset: Be nimble, agile, and willing to learn.
- You will never know (or remember) everything that you need to know.
- Just do it! Try something new and create your own learning opportunities.



Melanie Matthews (she, her) is the part-time executive director of Cedarmere Foundation, the founder of Brassington Consulting, and a senior advisor at BDO FMA. She is a guest editor of this issue of PEAK Grantmaking Journal and a former member of PEAK’s board of directors.



Our chapters, communities of practice, affinity groups, caucuses, CONNECT, board and other volunteer opportunities offer many ways in which PEAK members can learn and lead together. Through PEAK's peer networks, our members are empowered to leverage emergent learning and activate each other as changemakers who will lead change in grantmaking practice.

We asked four PEAK volunteer leaders to reflect on how these spaces have helped to support members' learning journeys and how these experiences have driven new ways of thinking in their work. PEAK Community Knowledge Manager **Chantias Ford** led the virtual roundtable with Candid's Senior Director of Learning Experience **Janet Camarena**, who is a member of PEAK's board of directors; Rose Community Foundation Grants Manager **Kelly Costello**, who cochairs the PEAK Rocky Mountain chapter; Hillspire Director, Grants and Philanthropic Services **Katie Kaluza**, who chairs PEAK's Equitable Grantmaking Practices Community; and The Grove Foundation Grants Manager **Blanch Vance**, who cochairs PEAK's Black Caucus. Highlights from their conversation follow.

Ford: Why did you each join your respective groups?

Costello: I joined a PEAK chapter within weeks of starting in philanthropy. When I moved into a leadership role with the PEAK Rocky Mountain chapter, I started to think about how I was networking and how, whenever I'd run into challenges at my organization, I knew I had people I could reach out to, and learn from, to do my job better and grow. There is an incredible amount of knowledge held within each of PEAK's chapters.

Camarena: PEAK has a unique focus on grantmaking practice and elevating the importance of data in promoting transparency and, ultimately, building knowledge across the field. That aligns very well with the work we do at Candid—to harness technology to create openness and efficiencies that make the grantmaking process more humane for all concerned—so there have always been lots of opportunities to advance this work in tandem. I first became involved with PEAK presenting on the importance of foundation transparency at chapter meetings and national conferences. I was very proud to join the board because PEAK pushed the field to improve its practices before it was fashionable to do so, and has long emphasized that it's not just about what you fund, but how you fund.

Vance: I've found PEAK to be a great space to find out the latest information, meet new people, and have fun being involved with my chapter, PEAK Southern California. At The

Grove Foundation, we try to center our grantees by making our processes really easy, so when Rachel Kimber reached out to me about presenting and then cochairing the Oral and Alternative Reporting Community, I totally wanted to do it.

Kaluza: I wanted to learn about what my peers were doing to implement more equitable practices at their organizations, as well as make sure that my organization's grantmaking practices matched its strategy to reduce the racial and ethnic wealth gap in Chicago. Change is always hard, particularly around longstanding practices. Being able to talk with other people from foundations all over the country has been helpful in learning how to implement more equitable practices.



Ford: Some of your groups are newer, and some are more established, but you're all still figuring things out as you go along. How do you embrace the messiness of learning and operationalize learning cultures within your groups?

Costello: We had to figure out how to be creative when people were interested in getting involved in our regional chapter, but held back because they weren't sure what specific roles entailed or if they would be able to be successful in a role. The program chair position was one that felt really scary to people because they thought they would be solely responsible for deciding what our chapter was interested in and finding speakers.

The chapter leadership team adopted a loose, consensus-based decision-making model that made the lift a lot lighter, so more people showed up at the table. We keep trying lots of ways to figure out what offerings will meet the needs of most people. There's no one right answer.

Also, the right answers change over time. A few years ago, we thought about focusing on sharing our forms and templates, but only a few people were interested. But someone else recently brought this up and there's greater interest now. You need to be able to recognize when it's the right time to pursue something and be willing to try things again. You don't necessarily know where conversation will lead, but you ride the wave, see where the energy is, and dig in.

Camarena: There is a big learning curve when joining a board. It can be a bit intimidating, especially leading up to the first board meeting, because the stakes are much higher as you become accustomed to the reality of what it means to take on a governance role for an organization you might still be getting to know. When you get that first agenda, you have lots of questions and, even with the best of board orientations, you don't want to slow things down by asking all your questions.

That's why my peer cohort on the board moved to institute a board buddy system to nurture learning and networking. Now, everyone who joins has a person to serve as their mentor. Beyond quickly getting your questions answered, you have your own ambassador to this new world of the board, which I think spurs one to be more willing to question and learn while also growing personal and professional networks.

Kaluza: In the Equitable Grantmaking Community of Practice, my cochair Kelly Hayashi and I were unsure of what people would want to talk about, so we relied on the community and volunteers within the community to be presenters. We didn't feel like we had to bring in outside experts because we wanted to hear what our peers were doing.

I always try to plan for exactly how facilitating a session should go, but with the community of practice, Kelly and I embraced the newness of it. We've tried to remember that, even if a session wasn't perfect, we were still learning and would learn how to do better next time. We both embraced that emergent aspect and relied on our peers to help us facilitate that community of practice.

Ford: It's critical to have spaces where people are able to support each other in their respective learning processes. With that in mind, how has your involvement in these groups supported your own growth?

Kaluza: I always thought that having a written report from the grantee was important to the learning process for both grantees and funders. But being involved in the community of practice and hearing from peers across the country on topics like alternative reporting methods has expanded how I think about certain practices, and how to support learning across grantees in different ways.

Costello: Through PEAK, I have access to a wide range of solutions from across the field, and I can then figure out which ones are a good fit for my organization. When those ideas get sparked, I feel empowered.

Ford: To build on that last comment, what takeaways from your respective group discussions have you brought back to your organizations? Are you starting to see ways in which you're sparking new discussions and influencing new ways of working?

Camarena: Funders want to learn from the experiences of other funders, particularly because some practice changes can represent big culture shifts. Staff members, especially those not in a leadership role, can still make the case to leadership for solutions that worked at other foundations and how they might inform their own work. The practice of collecting those stories can be challenging, but PEAK's engaged membership provides a ready pipeline of shared experiences.

Also, people learn most from the mistakes of others, yet stories of funders being vulnerable are hard to come by. But PEAK creates a safe space for members. For example, PEAK and Candid teamed up in the early days of the pandemic to convene a Community Conversation about how funders were adjusting their practices in response to the pandemic. This created a safe space for funders to compare notes, learn from one another, and reflect on how their own practices and processes could either help or hurt the situation. Participants recognized the opportunity to streamline applications and tedious reporting requirements and to take on more of the burden for doing the due diligence on grantees by using publicly available data and material provided to other funders.

Vance: There are only eight of us on staff, so sometimes it's just easier to talk to somebody else. In the peer group, someone may be working through the same issue as you, and you can see what they've tested and how it worked. And I can go back to my organization with what others have done and what the outcomes were. From a time perspective alone, it's helpful.

Ford: Can anyone speak to an instance where their thinking has evolved as a result of the conversations you've had in your groups? What did that evolution look like?

Camarena: PEAK's values and Principles guide the way I think about being a board member and how we learn and grow as an organization. For example, I cochair the board's strategy and organizational effectiveness committee. As we work to align with PEAK's Principles around streamlining and being good stewards of our resources, we aim to rightsize our own operations so that we're not unnecessarily burdening

staff with lengthy reporting, allowing them to focus on what's most meaningful to informing and sharing our impact story. The board has also given staff permission to push back on funders when their proposal guidelines don't align with PEAK's values around reducing grantee burdens. We really believe that PEAK can and should use its interactions with funders as teachable moments about what's not okay.

Vance: For the Oral and Alternative Reporting Group, it's been a nice reminder that implementing trust-based practices is a journey. I've had the chance to revisit some of my organization's agreements, tweak them, and make them easier for our grantee partners. Just because you're employing those practices, it doesn't mean you stop there. There are opportunities to continue to grow. And it's been nice to see the different ways that organizations or foundations operate, to see if there's an opportunity to apply their practices to the work that I do at Grove.

Ford: Emergent learning requires us all to be vulnerable in owning up to the fact that we may not have all of the answers before diving into a project or a conversation. How do you navigate that discomfort around the messiness of learning?

Costello: We're all looking to each other to share that knowledge and expertise. But it can be hard for people to be comfortable owning the fact that they have expertise. Peer networks give opportunities for people to share learning, successes, and challenges. I have learned a lot from people because they have been transparent about their own processes, and we can then engage in conversations where we can build on each other.



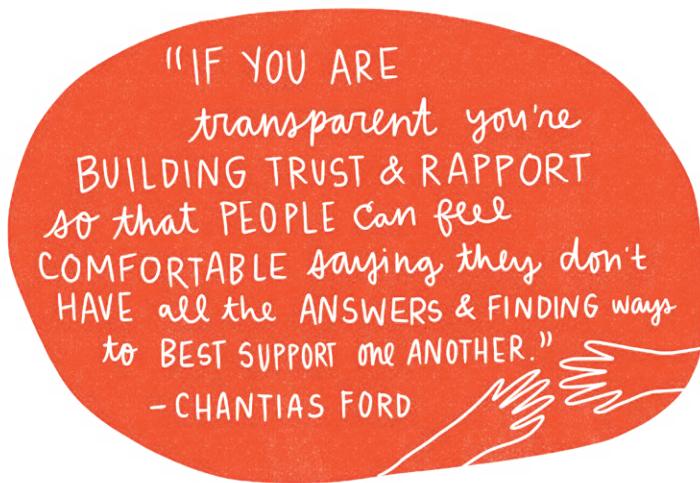
Kaluza: Kelly Hiyashi and I were the first to lead PEAK's Equitable Grantmaking Practices Community, and I tried to not worry too much about getting everything perfect. We had to acknowledge that we were trying to do something new and that it's hard to bring change back to our organizations.

A critical part of emergent learning is creating space for community members to reflect on their successes and challenges and to share their personal and organizational learning with the group. So we incorporated peer coaching into some of the sessions to make space for group think, live troubleshooting, and reflection. At the end of the year, we as a community realized that talking about these issues and reflecting on our experiences was contributing to change at our organizations, particularly in the areas of alternative reporting methods and incorporating more flexibility in reporting requirements.



Camarena: I'm reminded of the importance of trust when you're part of a group and you're learning from and with one another. If you want to have meaningful learning interactions, discomfort will be part of it because no one is an expert in everything. Discomfort is a good thing, because it shows that you're pushing the group to a different place—hopefully a better place. But if you don't trust the group, there's a lot of silence and unwillingness to have those authentic conversations.

That's why PEAK's Narrowing the Power Gap Principle is so important. Many funders will say they want to use their reports as a learning experience for all concerned, but the reports about what doesn't work can't be punitively used against a grantee—otherwise reports will continue to have a positivity bias toward the funder that limits the learning opportunity.



Ford: I think about all the conversations we've been having around creating a safe space to question things and to learn without the fear of repercussions. I also think about how our principles address transparency and how to build trust with grantee partners through transparency.

If you are transparent, you're building trust and rapport so that people can feel comfortable saying they don't have all the answers and finding ways to best support one another. So, to help our members think through what an emergent learning culture might look like for them, what action items should people take?

Vance: Don't be afraid to try. I'm somebody who likes to be on the front end of changing things. Just jump in there and see if you can get other people on board to do something with you. I haven't had a lot of people say no when I ask if they want to partner with me on something. It's always nice to have core co-conspirators if you're trying to do emergent learning within your organization.



Kaluza: To build on what Blanch said, implementing equitable practices may seem like a huge challenge in certain organizations. Instead of thinking about the enormity of bringing about change, focus on what you can do to move a little bit forward—even if it's only 15 percent of a solution, it's still a good thing to move forward in smaller steps toward an overall solution. And then, hopefully, you can build on that 15 percent or those smaller steps. That mindset helped to reduce some of the enormity of the work for me.

Camarena: Find an ally to help you and lift up peer voices outside your organization. It's then that you can make the case internally and start to drive change. To that end, engage in the kinds of networks that PEAK provides so that importing and exporting best practices can actually happen—PEAK offers so many helpful chapter meetings and webinars where members can share their best practices. You also need to have a safe space inside your foundation where you're able to bring those lessons inside and have them be heard.

Costello: Find spaces where you can be vulnerable. That could be with a trusted colleague, whether that's internal at your organization or within PEAK. This includes a range of asking questions or acknowledging things we don't know, or even strategizing about how to propose new approaches when there is internal organizational resistance. You need to have people you can go to to let it all out, to be in the messiness together, so that you can get to a place where you're going to take things next. ▲

PEAK's Peer Network Playbook

- Just jump in: Join your chapter, or a peer group, and volunteer!
- Find allies for your emergent learning journey.
- Find spaces where you can be vulnerable.
- Don't be afraid to try—and be willing to retry.
- Lift up perspectives from outside your organization.
- Focus on moving just a little bit forward.
- Everyone has expertise.
- Remember: Discomfort is a good thing.
- Build relationships and have fun!

Emergent Learning in Practice: The cocreation of PEAK's peer groups

By Sara Sanders



Before the start of 2020, PEAK Chief Operating Officer Dolores Estrada shared her vision with PEAK staff: "This is your Play-Doh year."

This was her call to action for us to spend the year ahead exploring, imagining, and testing new ideas to create a better organization for ourselves, our dedicated community of change agents, and philanthropy. It started as a fun invitation, but the unprecedented turn of events that followed quickly made reshaping how we work and connect as a community a necessity.

As the pandemic took hold, it was inspiring to see how our members adapted to the virtual world, bravely showed up at our convenings, and journeyed forward in advancing practice change work together. And in the months following George Floyd's murder, members shared with us how they wanted new and different spaces to find support, build camaraderie, and learn together to operationalize equity.

At the time, neither we nor our members knew what we might cocreate to meet these needs, but over multiple, generative discussions, we developed peer groups that centered on personal and professional identities, along with groups focused on practice change work centered on diversity, equity, and inclusion. Using Jamboards, we started by simply asking questions: What kinds of communities do you want that you don't currently have? What goals should these groups strive to meet? How else can we meet these needs? We'd listen carefully, review all the ideas, find common themes, then share what we heard and try again.

It was messy. Cocreating something new with 44 members and a handful of staff—each person bringing their own ideas, needs, passions, and experiences—was not easy. We needed time and open, safe spaces to discuss and test ideas.

It was sometimes uncomfortable. Peer groups were very personal and meaningful for our members and were created during a time when many were processing intense feelings



THIS IS
your
PLAY-DOH
year.
- DOLORES ESTRADA

of grief and anxiety. Developing a strong foundation of trust within the working group was key to navigating heavy topics during heavy times.

But it was also fun! I loved the adventure of creating something from scratch with people I admire and respect. It was a rare opportunity to imagine what could be, and then sculpt our shared vision together.

When we launched the first slate of peer groups at PEAK2021 Online, the response was huge. We started hearing from other segments of our community, learned about additional needs, and created new peer spaces to best support our members. Today, over 500 members are participating in one or multiple peer groups. We are now starting to ask ourselves new questions: How do we support these groups equitably and consistently? What guardrails help our peer groups to be successful? When should we make space to honor the freedom and leadership of our volunteers? When does PEAK introduce new ideas and novel approaches? How do we share what we've learned within these groups with our entire community and the entire PEAK team?

While our Play-Doh year has ended, we're not finished testing new ideas and embedding what we learn into how PEAK engages with its membership. Putting the Play-Doh away just isn't an option. ▲



Sara Sanders (she, her) is PEAK's membership director.

PEAK Community



While *emergent learning* is a new term we are using to explain the type of organization we want to build, the networks we want to foster, and the philanthropic values-alignment we want to lead across the sector, the qualities of emergent learning—curiosity, transparency, diversity, vulnerability, collaboration—reflect how we’ve always operated, and so much of what our community does day in and day out.

Whether it’s exploring the creation of a mentorship program with our members, meeting with a chapter or caucus to discuss grant reporting or career trajectories, or trying out a new volunteer role, we are always learning from and with you, our members.

We are excited to share all of the ways we’ve been convening, connecting, sharing, and learning together in 2022, celebrate our growing community and our members’ career trajectories, and give you a sneak peek of what’s coming next.

GOVERNANCE



Board of Directors Update

This past year, PEAK's board of directors has been on a journey to explore what it means to be a best-in-class governing body and has led with imagination, collaboration, and care. We are excited for the board to continue this work under the direction of our new officers (from left): Cochairs **Allison Gister**, Conrad N. Hilton Foundation and **Miyesha Perry**, Bainum Family Foundation; Treasurer **Elsa Chin**, JPMorgan Chase & Co.; and Secretary **Jane Ward**, Meyer Foundation. We also extend our deepest gratitude to **Bridget De Leon**, The Char and Chuck Fowler Family Foundation, who resigned from the board earlier this year, for her service.

The nominating committee, cochaired by Perry and **Adam Sanders**, Mother Cabrini Health Foundation, is now interviewing candidates to serve on the board for the 2023–2026 term. The committee is working to ensure a board that is diverse in personal demographics, organization

type, job band, and region, and they are prioritizing candidates' demonstrated dedication to PEAK's Principles and community, as well as experience and commitment to DEI, evaluation, finance, and fundraising.

We look forward to sharing five new candidates for approval by our membership in spring 2023. Special thanks to committee members **Kathleen Badejo**, William and Flora Hewlett Foundation; **Alexandria Featherston-Gomez**, Kenneth Rainin Foundation; **Dominique Hilliard**, Ballmer Group; **Kerri Hurley**, Barr Foundation; **Adam Liebling**, Cystic Fibrosis Foundation; **Kelly Martin**, The James Irvine Foundation; **Bonnie Rivers**, The JPB Foundation; **Deena Scotti**, Missouri Foundation for Health; **Suzanne Shea**, Ford Foundation; **Ursula Stewart**, Salesforce.org; **Kristen Summers**, East Bay Community Foundation; and **Patrick Taylor**, Zellerbach Family Foundation.



TEAM LEARNING

PEAK Board and Staff Host First Annual Retreat

During the final week of July, PEAK staff and board members gathered for an inclusive convening focused on connecting, learning together, and strategically planning for the future. Board members reported that they appreciated getting time to dig into board culture and align around the steps needed to have a best-in-class governing board. Staff launched into formal work on racial equity, brainstormed ways to more deeply infuse our Principles throughout the organization, and learned about one another's strengths and work styles. New connections were made, relationships were deepened, and there was a healthy mix of learning, food, and fun. Special thanks to our facilitators **Jackie Hanselmann Sergi**, Radical Spark Coaching; **Mia Roberts**, Freshpower; and **Daniel Weinzveg**, Weinzveg Consulting; and to our meeting planner **Marva Lewis McKnight**, MLM Consulting.

COMMUNITY NEWS



Former PEAK Southeast Communications Chair **Suzanne Philemon** has been promoted to executive director at The Cannon Foundation.

PEAK DEI Learning and Support Community Cochair **Valerie Black** has been promoted to senior community organizer at the Kansas Health Foundation.



Former PEAK Northeast Cochair **Indya Hartley** has been promoted to director, grants management at The ELMA Philanthropies.

Mary Eisler has retired from the Walther Cancer Foundation, where **Susan Luse** has started as the new office and program administrator.

PEAK Equitable Grantmaking Community Cochair **Katie Kaluza** has started a new role as director, grants and philanthropic services at Hillspire.

At the van Beuren Charitable Foundation, **Kim Dame** has been promoted to operations manager and **Grace Loughborough** has been promoted to program assistant.



Sarita Michaca, former PEAK Northeast volunteer, is now director of grants at Tides.

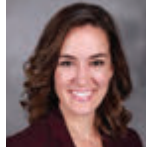
Sara Jatcko has been promoted to senior specialist, grants operations at DuPont.

Former PEAK Board Cochair **Gary Romero** has retired from the Virginia G. Piper Charitable Trust.

Jessica Gonzalez-Wagner has started a new role as senior grants manager at the Groundswell Fund.

PEAK2022 Conference Committee Member **Kathleen Badejo** has started a new position as program associate at the William and Flora Hewlett Foundation.

PEAK Latinx Caucus Steering Committee Member **Cecilia Rivas-Gonzalez**, of The Frederick A. DeLuca Foundation, was a part of the Council on Foundations Career Pathways 2022 Spring Cohort.



Holly Dodge has retired from The Wallace Foundation.

Jonathan Goldberg, a PEAK board alumnus, is celebrating 25 years of service at The Surdna Foundation.



Marcus McGrew, a PEAK board alumnus, began a new role as director of grantmaking, learning, and operations at the William and Flora Hewlett Foundation.

Former PEAK Northern California volunteer **Kayla Cook** has joined 1892 consulting as a grants management consultant.

Volunteer Leadership Summit Planning Committee Member **Roberto Cremonini** has been promoted to senior VP of client innovation and impact at GivingData.

PEAK2022 Conference Committee Member **Bernadette Gladish** was promoted to grants and programs manager at the Greater Cedar Rapids Community Foundation.



George L. Askew, MD has been appointed president and CEO of the Meyer Foundation.

PEAK2022 Conference Cochair **Amy Hall** has been promoted to senior charitable giving associate at the Georgia Power Foundation.

PEAK Midwest Leadership Committee Member **Deborah Clark** has been promoted to director of grants management at the Woods Fund Chicago. This summer, Woods Fund staff and board, philanthropic peers, and dear friends came together to celebrate Deborah's 20th anniversary, posting this

message to LinkedIn: "Deborah is the memory, the glue, and the joy that has held the mission of the foundation up high over the past two decades."



PEAK Board Member **Teresita Maz** has been promoted to VP of operations at BlueCross BlueShield of North Carolina Foundation.

Anna Huynh, PEAK AANHPI Caucus Cochair, has started a new role as grants and systems director at the Baszucki Family Foundation.

Former PEAK Northeast Cochair **Paige Granger** has been promoted to managing director, grants management at The Rockefeller Foundation.

Kristen Summers, former PEAK Mideast chair, has started a new role as grants and scholarships manager at the East Bay Community Foundation. PEAK Minnesota Cochair **Kaitlin Ostlie** also began a role at the Foundation as senior grant specialist.



PEAK Board Member **Steven Casey** has started as deputy director of grants at the We Mean Business Coalition.

PEAK Oral and Alternative Reporting Working Group Cochair **Rachel Kimber** has joined Smile Train as vice president, grants management.

Emerson Merkerson has been promoted to director of grants administration at the Charles Stewart Mott Foundation.



Roshell Rinkins has been promoted to VP for grants administration and chief DEI officer at the John S. and James L. Knight Foundation.

PEAK Northeast Communications Cochair **Abigail Osei** is one of the

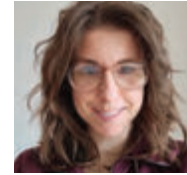
Youth Giving Summit ambassadors for The International Social Impact Institute's inaugural event.



PEAK Board Member **Adam Sanders** was promoted to managing director of grants management at the Mother Cabrini Health Foundation.

PEAK Midwest Cochair **Tara Havlicek** has been promoted to program manager at the Mitsubishi Electric America Foundation.

Traci Johnson, PEAK Small Foundations Affinity Group cochair, began a new role as director of grantmaking at The Pittsburgh Foundation.



Krista Batey has started a new role as director of grants management at Resources Legacy Fund.

Wendy Elliott has begun a new role at United Way of Central Oklahoma as vice president of community impact.

PEAK Greater Washington, DC Cochair **Andrew Brown** is now mission adaptation grants manager at the American Red Cross.

Kristy Klein Davis was appointed president of the Healthcare Georgia Foundation.



Miabi Chatterji has started a new role as grants manager at the Howard Gilman Foundation.

Andrea Ricci has started a new role as associate grants and administrative manager at the George Family Foundation.

Kenneth Jones has been promoted to senior vice president and chief operating officer at the MacArthur Foundation.

Former PEAK Southwest volunteer **Celene Meyer** has retired from the Episcopal Health Foundation after 30 years of service.

PEAK Board alumnus **Ericka Novotny** has been promoted to senior director, grantmaking effectiveness at the Arcus Foundation.



PEAK DEI Learning and Support Community Cochair **Tanisha Davis** has been promoted to vice president of grant operations and planning at the Archstone Foundation.

Isabel Sousa-Rodriguez from the Edward W. Hazen Foundation will be part of the 2022 HIP Lideres Fellowship with Hispanics in Philanthropy.



Kelly Matti has been promoted to director of grants management at the Virginia G. Piper Charitable Trust.

Former PEAK Northeast Communications Cochair **Tashie Sloley** has started a new role as grants manager at the Climate Breakthrough Project.

Former PEAK Delaware Valley volunteer **Maria Stecker** has been promoted to senior program officer, grantmaking at the Longwood Foundation.

Susan Clark has started her own consulting business, Susan Brigid Consulting.



PEAK AANHPI Cochair **Sheryl Saturnino** has been promoted to community investment officer at The Miami Foundation.

Former PEAK Corporate Grantmakers Affinity Group Cochair **Margaret Buckley** has been promoted to director of the McKesson Foundation.

Former PEAK Northeast Vice Chair **Liza Lagunoff** has been promoted to senior director, grants budgeting and management at The New York Community Trust.

Vanessa Gonzalez has been promoted to director of grant programs at AASM Foundation.



Accountability and Action for Allies Caucus Cochair **Kelsey Andersen** has joined the Arcus Foundation as manager, grants and information systems.

PEAK Board Member **Eusebio Diaz** has joined the Health Forward Foundation as vice president of strategy, learning, and communications.

PEAK Florida Communications Cochair **Brittany Timmons** has started a new role as principal consultant at B Elevated, LLC.



PEAK board alumnus **Adam Liebling** has started a new role as VP of grants management, contracts, and administration at the Cystic Fibrosis Foundation.

Dan Schoenfeld has joined the Bezos Earth Fund as director of grants management.



Heather Craig has been promoted to senior grants specialist at the Medica Foundation.

Bianca Carter has joined Borealis Philanthropy as program officer of the Racial Equity in Philanthropy Fund.

PEAK Board Cochair **Miyasha Perry** has joined the Bainum Family Foundation as director of grants management.

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

Welcome, New Organization Members

Akonadi Foundation
 Amalgamated Foundation
 American Diabetes Association
 Baszucki Family Foundation
 The Bob & Renee Parsons Foundation
 The Broad Foundation
 Building Impact*
 The Camille and Henry Dreyfus Foundation
 Cargill
 Center for Disaster Philanthropy
 Climate Imperative
 The Community Foundation of Muncie & Delaware County
 Community Foundation for Southeast Michigan
 Cystic Fibrosis Foundation
 Democracy Fund
 Dorot Foundation
 Dramatists Guild Foundation
 The Eleven Consulting*
 Emerging Practitioners in Philanthropy
 Fondation CHANEL
 Fremont Group Foundation
 General Mills
 Group Health Foundation
 Health Net
 Health Research Alliance
 HMSA Foundation
 Indigo Innovation Group*
 Jewish Community Foundation of Greater Phoenix
 Katz Amsterdam Foundation

Laird Norton Family Foundation
 Lucile Packard Foundation for Children's Health
 Marguerite Casey Foundation
 MetLife Foundation
 MJS Foundation
 National Assembly of State Arts Agencies
 North Star Impact Group*
 O. Wayne Rollins Foundation
 Omaha Community Foundation
 Perenchio Foundation
 The Pew Center for Arts & Heritage
 Poetry Foundation**
 Project Management Institute Educational Foundation
 Resources Legacy Fund
 Roey Thorpe*
 Roundhouse Foundation
 S. Mark Taper Foundation
 S.H. Cowell Foundation
 The SCAN Foundation
 SECU Foundation
 Sunlight Giving
 United Way Fox Cities
 United Way Suncoast
 Urgent Action Fund for Women's Human Rights
 YMCA of the USA
 The Zeist Foundation

*Consultant Members
 **Sustaining Members

2022 Volunteer Leadership Summit

PEAK hosted its signature Volunteer Leadership Summit from September 19–22, with more than **100 volunteer leaders** from across our community coming together virtually to participate in professional development, networking, and self-care activities geared toward building leadership skills. This summit is a way for us to celebrate and give back to the volunteers who have lead peer networks, participated in our advisory councils and committees, served on the board of directors, and acted as PEAK champions over the years.

This year's summit incorporated a unique mindfulness session led by **Melissa Mueller-Douglas** of MYRetreat that featured a tasty twist (practicing mindfulness with chocolate—yum!), an interactive workshop focused on navigating the complexities of leadership led by **Marissa Lifshen-Steinberger** of One Eleven leadership, and a panel on leadership and career trajectories featuring volunteers **Jina Freiberg**, Katz Amsterdam Foundation; **Traci Johnson**, The Pittsburgh Foundation; and **Abigail Osei**, The Starr Foundation; and facilitated by PEAK board alumnus **Adin Miller**, Los Altos Community Foundation. **Ruchika Tulshyan**, founder of inclusion strategy practice Candour, presented the keynote, "From Intention to Impact: Inclusive Leadership for Immediate Change," highlighting the importance of psychological safety to creating a truly inclusive workplace.

PEAK offers its deepest gratitude to the planning committee for cocreating this event with us, including Johnson, Miller, and Osei, along with **David Bender**, Pinellas Community Foundation; **Roberto Cremonini**, GivingData; **Elizabeth Donohue**, Peter G. Peterson Foundation; **Alexandria Featherston-Gomez**, Kenneth Rainin Foundation; and **La Keisha Leek**, MacArthur Foundation.

AROUND THE CHAPTERS

Deepening peer relationships, exploring challenging topics, and expanding the grants management skills toolbox are priorities for our chapters. Many are hosting frequent, informal conversations with members that often lead to aha moments and make participants feel more connected to the work and the community of philanthropic professionals. And to help ease the day-to-day challenges of navigating a pandemic, chapters have been finding ways to highlight the simple joys in life and bring levity to the work through lighthearted icebreakers and activities. PEAK has the amazing privilege of working with talented, dedicated volunteers who unwaveringly lead chapters in developing and strengthening meaningful connections!

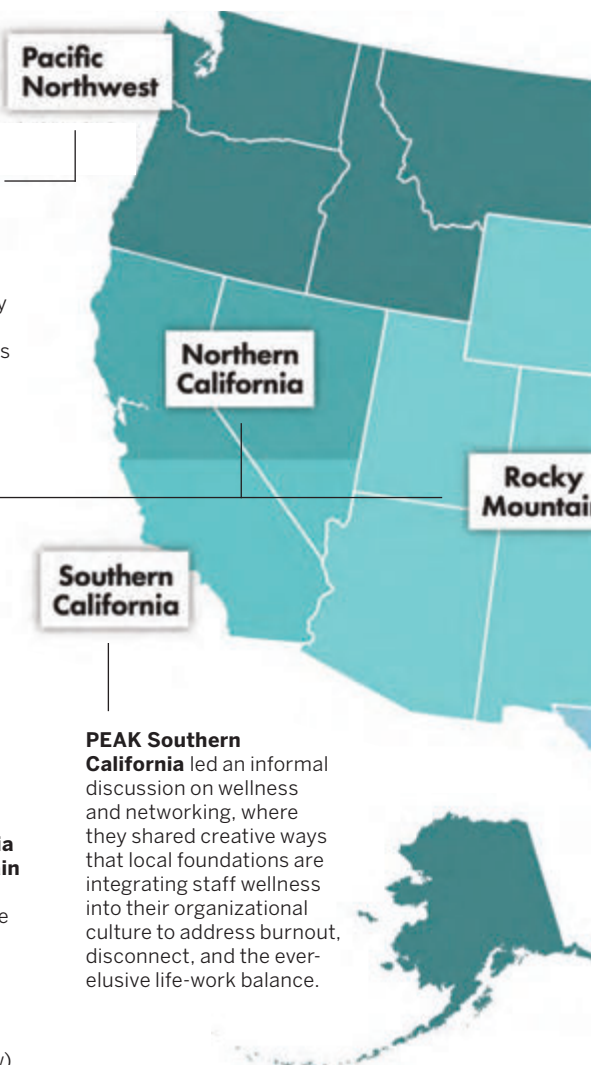
—**Altinay Cortes, Chapter Manager**



In addition to hosting two coffee hours, **PEAK Pacific Northwest** led a riveting conversation about the basics of advocacy and lobbying in philanthropy. Brassington Consulting's Melanie Matthews and Northwest Health Foundation's **Felicit Monteblanco** (shown here) shared ways that philanthropic professionals can legally and ethically advocate for the causes they support and engage with local elected officials. Members learned the differences between political and philanthropic advocacy and lobbying and left with examples to help them try out much of what was discussed.



PEAK Northern California and **PEAK Rocky Mountain** collaborated to lead an engaging discussion where grants management professionals shared the ways they used trust-based philanthropy principles to change practices at their organizations. This event featured the perspectives of (left to right, from top row) Stupski Foundation's **Malila Becton-Consuegra** and **Daniel Oviedo**, San Francisco Foundation's **Brandi Howard**, General Service Foundation's **Elaine Mui**, and Zellerbach Family Foundation's **Patrick Taylor**. Each panelist explained how their organization began the journey and where they are now.



PEAK Southern California led an informal discussion on wellness and networking, where they shared creative ways that local foundations are integrating staff wellness into their organizational culture to address burnout, disconnect, and the ever-elusive life-work balance.

PEAK Minnesota led a panel of policy, legal, government, and philanthropic experts in which they discussed the strategies that the nonprofit and government sectors can employ to support and strengthen our democracy. The panel encouraged attendees to explore the ways their organizations can step up and participate in civic engagement work.

This year, **PEAK Midwest** launched a series of coffee chats featuring an array of topics and volunteer hosts. A recent chat centered on ways to support one another as organizations continue to navigate the changing landscape of work settings. Members will continue gathering to discuss trends in philanthropy and grantmaking practices while strengthening and building relationships with colleagues.

In partnership with Grantmakers of Western Pennsylvania, **PEAK Mideast** cohosted a workshop about smart grant reporting, where participants further developed their competencies in communications and knowledge management while exchanging best practices and new ideas with peers.

PEAK New England launched monthly coffee hours this year. Topics have ranged from tipping, grassroots funding, and fiscal sponsors to a deep dive on how the grants management team at Borealis Philanthropy weighs the pros and cons of working as a philanthropic intermediary. These coffee hours have led to rich discussions and resulted in attendees sharing numerous resources and tactics to handle all sorts of complicated challenges.

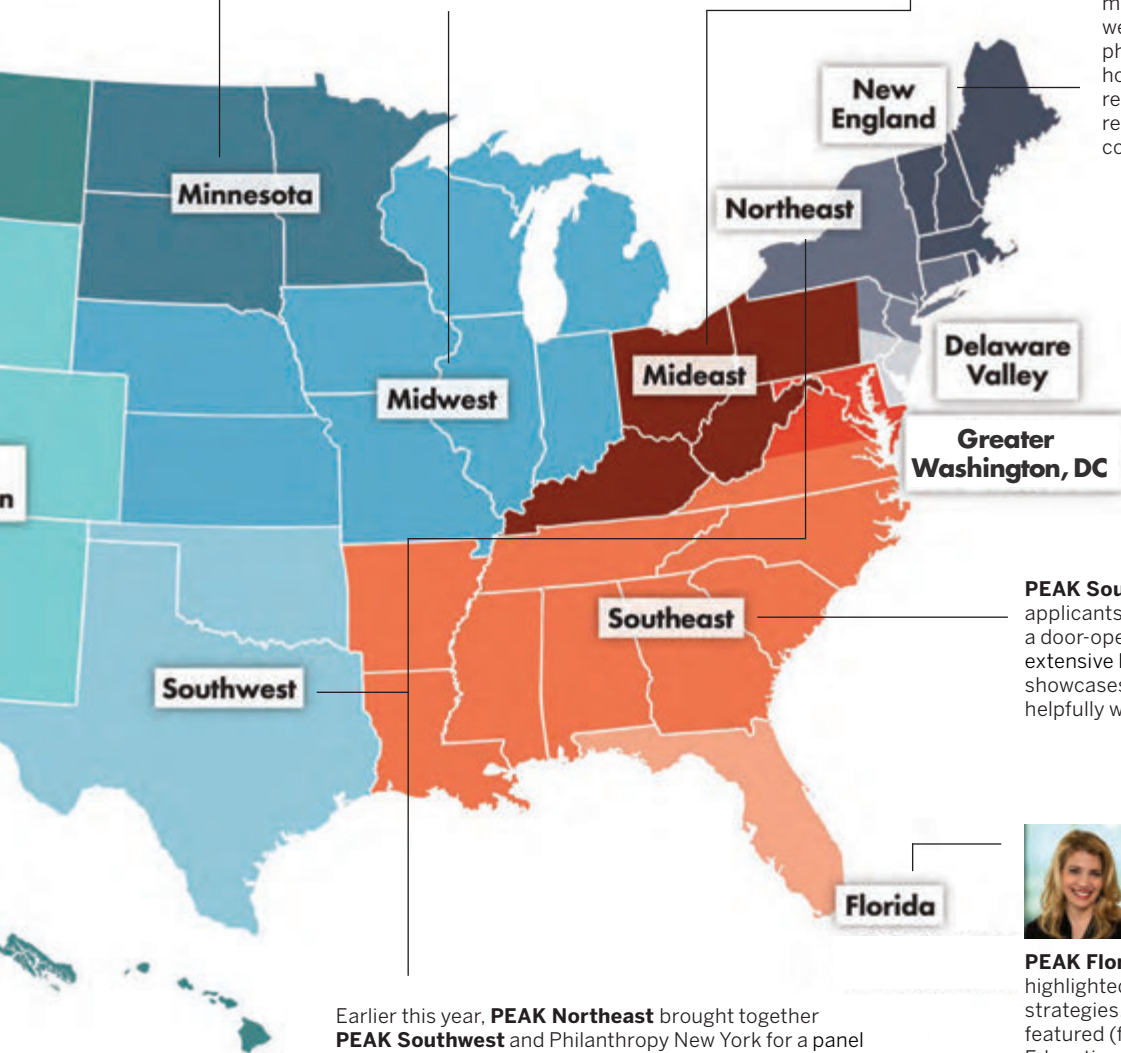
PEAK Greater Washington, DC led a webinar that explored how the American Nurses Foundation handles rejections, and the challenges they face when trying to offer support to applicants that were denied funding.

PEAK Southeast discussed ways to say no to grant applicants in a way that makes an organization a door-opener rather than a gatekeeper. The extensive list of sample messages they created showcases a variety of ways to communicate helpfully when organizations aren't a good match.

Earlier this year, **PEAK Northeast** brought together **PEAK Southwest** and Philanthropy New York for a panel conversation on information governance and managing grant records. Participants learned from thought leaders in foundation archiving who covered the value of foundation records for future internal and external research and the challenges and opportunities presented by the move to digital recordkeeping. This dynamic discussion was the most highly-attended virtual chapter meeting to date!



PEAK Florida led a robust discussion that highlighted the value of multiple communication strategies. The star-studded panel, which featured (from left) **Grace Maseda**, Helios Education Foundation, **Jessica Cohen**, The Miami Foundation, **Lashonda Curry**, Florida Humanities, and **Leigh Davis**, Pinellas Community Foundation, shared ways to efficiently link grants management to communications that ensure that a foundation's work, and the work of their grantees, does not go unnoticed. They also explored annual reports, grantee stories, and social media reels.



PEER-TO-PEER SUPPORT

PEAK Completes Its First Pilot Mentorship Program

PEAK concluded its first-ever mentorship program this July after a year of connecting grants management peers to support one another on their career trajectories! Forty-two members from across the PEAK Northeast chapter committed to the program, where they were paired intentionally by our selection committee. Pairs met at least six times throughout the year, and periodically as cohorts of mentors and mentees to troubleshoot challenges, share resources and ideas, and discuss ways we can improve mentorship opportunities moving forward.

A common thread in what we heard from both mentors and mentees was how mentoring can be a mutually beneficial experience when power dynamics are addressed and minimized, and the focus is put on co-learning.

Mentee **Zenia Dacio-Mesina**, World Education Services Mariam Assefa Fund, stated that it was “so helpful to get to chat with someone else in grants management and hear

a different perspective. At some point, the line between mentor [and] mentee became blurred and I enjoyed having a peer to discuss various grants management topics with!”

Mentee **Elizabeth Flores-Amaya**, Women’s Sports Foundation, had “only positive things to say about the program. It was such a great experience that my mentor and I have decided to continue to stay in touch.”

This program was developed to honor the memory and legacy of **Orneata Prawl**, one of PEAK’s beloved founding



members, an early volunteer chapter leader, and a mentor to countless professionals. Our special thanks go out to the Ford Foundation and Salesforce.org for sponsoring this effort. We will share information about the next iteration of the mentorship program in the new year.

PROGRAMS

Grants Management 101—Class of 2022

In August, PEAK launched its latest iteration of Grants Management 101 as an interactive virtual learning series designed to take a deep dive into the fundamentals of grants management, the philanthropic sector, and equitable, effective grantmaking practices. Thank you to NGOsource for sponsoring this year’s program.

Embarking on this journey with PEAK are 120 professionals new to the field. Across the five-month program, they’ll attend content sessions facilitated by a diverse faculty of PEAK staff and guest presenters, as well as cohort convenings that offer space to meet in smaller groups, discuss content together, go over homework, and connect with each other. These small groups are being facilitated by six Cohort Advisors, PEAK board alumni who are offering their leadership, time, expertise, and experience (left to right, from top row): **Jennifer Burran**, Fidelity Foundation; **Margaret Egan**, Egan Consulting; **Adriana Jiménez**, American Jewish World Service; **Adin Miller**, Los Altos Community Foundation; **Ursula Stewart**, Salesforce.org; and **Patrick Taylor**, Zellerbach Family Foundation.



PEER GROUPS

Learning, meaningful gatherings, peer sharing around practice-change work, and vulnerable conversations that deepen peer connections are at the heart of PEAK's peer groups. Each peer group centers community, giving members space to support one another through sometimes challenging discussion topics and the important change management work that's transforming the sector. These groups have continued their commitment to serve as supportive networks, evident in their ongoing conversations around self-advocacy in the workplace, intention setting, and reimagining reporting.

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

PEAK's Affinity Groups and Caucuses

All members are welcome to join these identity-based groups which are focused on networking and peer learning.

The **Asian American, Native Hawaiian, and Pacific Islanders Caucus (AANHPI)** hosted a discussion around self-advocacy in the workplace, with panelists **Andrew Brown**, the American Red Cross; **Belguun "Bella" Bat-Erdene**, Urgent Action Fund for Women's Human Rights; and **Lorraine Nibut**, Designing Justice + Designing Spaces, sharing their experiences followed by small-group discussions. Participants received various tips and approaches for being your own best champion.



The **Black Caucus** has been deeply focused on the interpersonal elements of career development. This year's conversations were facilitated by guest speaker and consultant **Denise Barreto** and by staff liaison **Chantias Ford**, and focused on professional and personal self-advocacy as well as navigating workspaces as Black professionals.

The **Accountability and Action for Allies Caucus** continues its practice of meeting every six weeks to build relationships within the group, reaffirm their collective commitment to allyship, and share challenges, successes, and lessons learned along the way. The caucus's three cochairs are eager to bring in outside voices to share expertise and dig deeper into learning and practicing the art of allyship.



The **Latinx Caucus** is building comunidad through periodic Cafecito Hours. Topics have included thoughtful intention-setting that balances organization and personal goals and career trajectories with PEAK Board Member **Eusebio Díaz** of Health Forward Foundation.

The **Corporate Grantmakers Affinity Group** hosted an open discussion during PEAK2022 Online covering business-aligned charitable giving versus non-business-aligned charitable giving, integrating trust-based philanthropy in corporate grantmaking, and working with employee resource groups to maximize impact.

The **Small Foundations Affinity Group** facilitated discussions around methods to create transparent and transformational processes and relationships with grantees.

The **Intermediaries Affinity Group** is hosting quarterly open meetings for those who work at a funding intermediary to talk with peers about their unique position in the sector and "all the little things nobody else seems to understand."

PEAK's Communities of Practice

Exclusive to Organization and Consultant Members, these groups are focused on organization-based peer learning and resource sharing and development.

DEI Learning and Support Community members are on a journey toward improving and elevating grantmaking practices that often go unnoticed or remain status quo. Earlier this year, they hosted a panel that featured several members who are

deep into the work of demographic data collection, sharing their perspectives on operationalizing the guidance from PEAK's *Driving Equity with Demographic Data Collection* and reflecting on the ways foundations must ensure that demographic data collection is instilled in the work of the organization.



The **Equitable Grantmaking Practices Community** has been building a strong community of growth and accountability. Utilizing a benchmarking survey from last year on equitable grantmaking practices, the group has been reviewing case studies and holding discussions on topics such as sourcing grantees equitably and alternative forms of reporting.

Sessions are designed to understand what others are doing, and to create goals to move practices forward at respective organizations.

The **Tech and Data Futurists Community** has focused on discussions and sharing resources around data management tools, techniques, and best practices. Members are able to learn better ways to utilize their grants management systems, manage and share data through innovative data dashboards, and use technology to develop more equitable grantmaking practices.

This spring, PEAK Grantmaking welcomed the **Grants Management Directors' Circle**, a safe space for senior-level grants management leaders at high asset foundations to support collaborative leadership, promote more equitable practices, and exchange ideas and learnings. **Jennifer Adams**, The David and Lucile Packard Foundation, and **Marcus McGrew**, William and Flora Hewlett Foundation are cohosting the group's fall retreat, which will be centered on healing, wellness, and celebrating ten years of connections.

PEAK's Working Groups

Working groups are informal forums created and led by PEAK members to explore specifically defined topics on grantmaking practice. Working groups are open to all members.

The **Oral and Alternative Reporting Working Group** has been busy exploring ways to shift reporting practices. Sessions have highlighted case studies from members who have adopted alternative forms of reporting, such as oral reporting or focus groups, or eliminated reporting altogether. Discussions have been rooted in framing for equitable, trust-based grantmaking practices. Recently, through a partnership with Philanthropy New York, the group held an interactive workshop on best ways to learn from nonprofit partners and how to shift the power imbalance through reporting.

The **Impact Assessment Tool Working Group** has hosted productive exchanges on ways to use tools and technology to better assess grantmaking impact. Recently, a question on the CONNECT forum sparked the creation of a session on using Microsoft Power BI to advance grants data reporting and data visualization. **Brittany Andersen**, Walder Foundation, led a panel conversation examining case studies with **Traci Johnson**, The Pittsburgh Foundation; **Patricia Jones**, Health Foundation of South Florida; and **Wendy Rohrbach**, Missouri Foundation for Health.

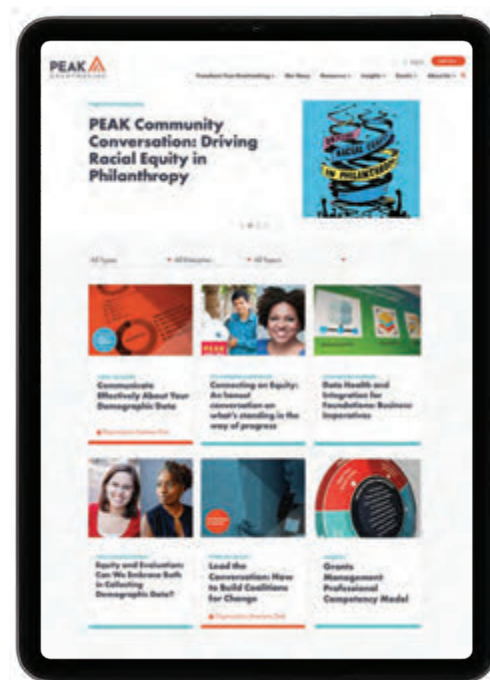
ONLINE RESOURCES

Member-Exclusive Tools and Insights

PEAK resources, tools, and insights are just a click (or two) away at peakgrantmaking.org. From the navigation bar, select the Resources tab to access our ever-growing collection. You can then use the dropdown menus to easily search by topic. Resources can also be searched by type: For example, select Annual Convenings for past conference keynotes and breakouts, or How-To Guide for a deep dive into our Principles. A global search tool at the top right of every page is a helpful shortcut if you know the title or speaker.

Click the Insights tab to access PEAK's expansive library of articles, weekly reads, and news, which is searchable by topic. Here, you can also explore every issue of the *Journal*, either choosing to download the PDFs or read the articles online.

Explore (and post) career opportunities on PEAK's job board. New in 2022: A filter to search for jobs with salary ranges posted. Searching for a new team member? PEAK members are invited to add job postings at no cost.



What's Next

UPCOMING RELEASE

Coming in 2023: A deep dive into our Steward Responsively Principle

Early next year, we will release an in-depth suite of resources around the Steward Responsively Principle for Peak Grantmaking. This Principle encourages grantmakers to manage all entrusted resources—people, finances, reputation, and time—with care to balance stewardship with an agile approach to risk. The release will include an openly-available action planner, case stories, and how-to guides exclusive to Organization Members. Be on the lookout for this release, and an invitation to join our Community Conversation for a deep-dive discussion around these resources.



ANNUAL CONVENING

Learn, Share, and Evolve at PEAK2023

We'll reunite in Baltimore from May 7–10. We're excited to debut a new kind of annual convening that invites and inspires the PEAK community to join us on a collective emergent learning journey toward more equitable, effective grantmaking.

And the timing couldn't be better: In 2023, we'll focus on our Learn, Share, Evolve Principle. Throughout those three days, and throughout the year, we'll lift up stories from across our community of the ways that PEAK members are leaning into each of our five Principles and transforming practices.

We'll bring diverse voices to the mainstage and introduce new experiences like open fishbowl conversations, world cafés, and ideation rooms to help us explore pressing questions, such as: What makes a best practice in grantmaking? What might philanthropy achieve if it centered around trust of our nonprofit partners? What's standing in the way of progress in our organizations and in our careers? And how can each of us activate as a changemaker, both inside our organization and across the field?

Be there and be inspired! We'll also be streaming keynotes and selected sessions for virtual participants.



PEAK Grantmaking
1701 Pennsylvania Ave NW, Suite 200
Washington, DC 20006



Come LEARN,
SHARE & EVOLVE
with the
PEAK
Community
NEXT MAY!

PEAK 2023
BALTIMORE
MAY 7-10