

Principles for Peak Grantmaking
Action Planner

A Three-Part Strategy to Transform Grantmaking Practice

**Learn,
Share,
Evolve**

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

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

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

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

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

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

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

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

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

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

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

Photo on preceding page by Kenton Waltz Photography

Our Learn, Share, Evolve Principle in Brief

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

Here are a few key questions to consider:

- What information can be unlocked from grants and knowledge management systems to improve practices, strengthen strategies, and synergize learnings?
- How can you adopt alternative methods for collecting information that align with the ways a grantee already measures impact, thereby reducing the burden of reporting?
- How does your organization demonstrate a commitment to learning with and from grantees and the grants staff working with them?
- How does your organization share your learnings both internally and externally?
- How do you collaborate with other funders to advance knowledge?

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

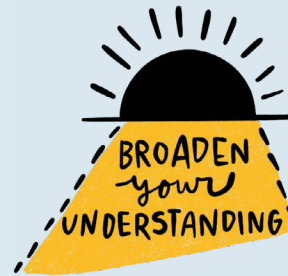
PEAK's Learn, Share, Evolve Principle invites grantmaking organizations to actively contribute to building sector-wide knowledge in pursuit of change and impact by sharing big ideas while also being open to the wisdom of others.

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

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

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A Primer on Emergent Learning



The following was adapted from the article **“Transforming Philanthropy Through Emergent Learning,”** which originally ran in the *PEAK’s Emergent Learning Playbook* issue of *PEAK Grantmaking Journal*.

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

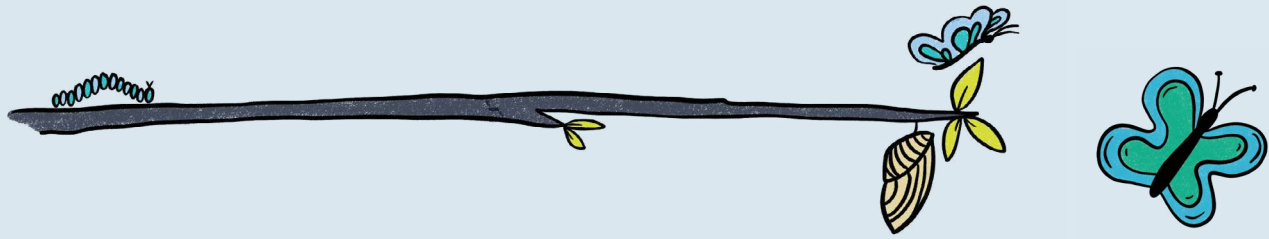
An emergent learning organization embraces learning and evolving. Sharing what you’ve learned and how you’re evolving allows your organization to contribute to other organizations’ evolution, and perhaps encourages them to embrace emergent learning. To become agile change agents, organizations need to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

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

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



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Here are the key qualities and practices of emergent learning:

- **Curiosity:** Curiosity lifts up space for constructive inquiry, allowing participants to reframe topics or issues with thoughtful questions and discussions. This provides a way to learn, plan, innovate, maximize impact, and measure success collaboratively.
- **Transparency:** Emergent learning is rooted in the free exchange of insights to create common understanding and generate discussion that analyzes issues from multiple perspectives. The sharing of all thoughts and thought processes is encouraged, as each can help to continue the dialogue.
- **Diversity:** Believing there is only one way of being and doing things is oppressive, promotes parochialism and ethnocentrism, and robs organizations of the ability to think creatively and to operate with multicultural competency. Inviting and including divergent and dissenting opinions will enrich the conversation, broaden your understanding, and help to develop even better solutions.
- **Vulnerability:** Emergent learning encourages participants to embrace the unknown, promoting a creative and dynamic work environment that embraces both experimentation and learning from mistakes. The authors of “Leading and Learning to Change: The Role of Leadership Style and Mindset in Error Learning and Organizational Change” write, “Organizations that are better equipped to turn mistakes into future opportunities and make them a part of the organizational learning process will be more adapted to the ever-changing global landscape.”

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

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

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



Three Action Steps

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

Implement practices that promote learning

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

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

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


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

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

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

- Identify the questions from your learning agenda that require data to be answered. They will lead you to gather internally generated and externally provided data that can yield insightful information.
- Consider the types of data you're asking nonprofits to supply that might be sought by others. Can you reduce the burden on nonprofits by identifying where that data may already be publicly available?
- Collect only that data which is useful. Ask yourself whether you can turn this data into information and knowledge that helps you make decisions or improve some aspect of your work.
- Ensure data is embedded within grants and knowledge management systems.

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



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Three Action Steps (continued)

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

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

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

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

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

Share knowledge to contribute to the sector's impact

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

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

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

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

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

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

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



Photo by Kenton Waltz Photography

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

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

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

Sharing what your organization knows should not be the responsibility of one person. After all, every internal stakeholder at a grantmaking organization—from your

board members to your CEO to your grants manager to your program staff—has something to share with the world. The point is that anyone can, and should, share what they know and what they have learned.

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

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

- How can the act of sharing lessons learned—even when the desired outcomes have not yet been or will never be met—help improve our approach to addressing community needs?
- How can we amplify lessons across issues, fields, and sectors?
- How can we demonstrate our commitment to sharing lessons learned internally and externally?
- How do we share and amplify learnings from the work of nonprofit partners (both grantees and non-grantees) internally and externally?

Evolve and be a part of transforming philanthropy

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

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

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

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

Below are just three of many such shifts:

- **The shift from transactional connections to connected relationships.** In a transactional relationship, the parties involved focus on their own self-interests, while a relational relationship is built on the idea that the connection between parties should be mutually beneficial. In practice, this means foundation staff are centering relationships with their nonprofit partners in the grantmaking process.
- **The rise of participatory grantmaking, a practice that more deeply involves community members and other stakeholders in the grantmaking process.** Using this approach, decision-making power is given to the communities that are affected by funding decisions. Community members may help design and drive programs, set goals, make decisions about how to allocate resources, and evaluate success. This relatively new practice continues to evolve as those involved learn from their own experiences and the experiences of others.
- **Compensating nonprofit staff and community members for their time.** Grantmaking organizations have often sought input from nonprofit staff and community members to inform their foundation's grantmaking practice or strategy. While compensation hasn't been a common practice in the past, being an equity-centered grantmaker calls for an examination of all practices, including this one. Like participatory grantmaking, this recent shift in methods for valuing the intellectual capital of nonprofit staff and community members is evolving as grantmakers across the country share their experiences.

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

- How can we approach organizational change courageously when we identify grantmaking practices that are misaligned with our values?
- What could it look like in our organization to rightsize the grantmaking process or implement more flexible policies and practices?
- How can we embrace risk and innovation in our grantmaking practices?
- How can we reduce the burden of grantee reporting?
- What would it look like if we aligned our reporting and evaluation needs with the ways our grantees measure impact?

PEAK Resources to Support You



The Learn, Share, Evolve issue of PEAK Grantmaking Journal is an extensive collection of insights developed and curated to help guide you in operationalizing this Principle. The *Journal*, which is exclusive to members, includes articles by our members and staff that take a deeper dive into these action steps

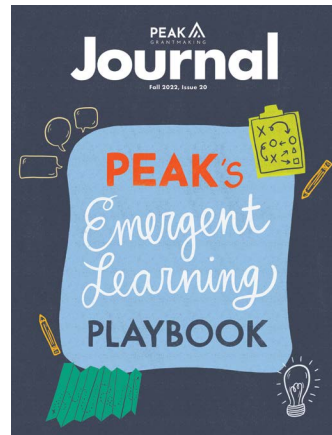
through stories from the field, interviews with sector leaders, and in-depth exchanges among peers.

Explore the Learn, Share, Evolve landing page for a continuously growing library of content, including the digital edition of the *Journal*, a downloadable copy of this action planner, and a video roundtable conversation with six grantmaking practitioners.

Explore our growing collection of Insights focused on the Learn, Share, Evolve Principle.

Here are a few of our recommendations:

- **“How Surdna Centers Trust and Learns With Grantee Partners”** by Jonathan Goldberg, Surdna Foundation
- **“Packard’s Personal, Ongoing ‘Grantsformation’”** by Jennifer Adams, Packard Foundation
- **“How the Rogers Family Foundation Partners Beyond the Grant”** by Rhonnel Sotelo, Rogers Family Foundation
- **“How Centering Emergent Learning Can Hone Your Grantmaking and Deepen Partnerships”** by Haley Sammen, Caring for Denver Foundation
- **“Transforming Philanthropy Through Emergent Learning”** by Chantias Ford, Melanie Matthews, and Shantelice White



Revisit the PEAK’s Emergent Learning Playbook issue of the Journal, published in 2022, which delves into the concepts and practice of emergent learning, an approach that is adaptive, inclusive, transparent, and curious. Inside, members from across our community share what being an emergent learner means

to them and what it looks like in practice. We hope that it inspires you to discover some new practices in your learning journey and to join PEAK colleagues in our shared spaces.


Explore these sector resources:

- **Before and After 2020: How the COVID-19 Pandemic Changed Nonprofit Experiences with Funders** by Katarina Malmgren, The Center for Effective Philanthropy
- **Foundations Respond to Crisis: A Moment of Transformation?** by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy
- **Foundations Respond to Crisis: Toward Equity?** by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy
- **Foundations Respond to Crisis: Toward Greater Flexibility and Responsiveness?** by Naomi Orensten and Ellie Buteau, The Center for Effective Philanthropy
- **Open for Good: Knowledge Sharing to Strengthen Grantmaking** by Foundation Center (now Candid)



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PEAK Grantmaking is a national nonprofit organization whose mission is to transform philanthropy by elevating the field of grants management and empowering grants professionals to lead the way in operationalizing equity-centered, values-driven grantmaking practices. To learn more about PEAK and its vibrant community of members who come together as emergent learners to drive change, visit peakgrantmaking.org.

A photograph of a woman with curly hair, wearing a denim jacket and a name tag that reads "Deb Vaughn". She is holding a microphone and speaking. In the background, another person is wearing a face mask. The image has a blue tint and a diagonal split.

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