

 **PEAK** Grantmaking

Journal

Fall 2020, Issue 17

Reimagining Grantmaking



What a year it has been,

with the profound impact of the pandemic on our lives, our work, and those we serve. We are grieved by the escalating racial, economic, and health inequities and outraged by leaders who continue to exacerbate those inequities. And we are driven to increase the impact of our work at PEAK, and the work of philanthropy, to create a more just and equitable world.

Have we ever felt so keenly aware of the imperative for philanthropy to get it right – to bring the full measure of our resources and know-how to meet the challenges of the moment?

Hundreds of grantmakers have quickly pivoted to respond to urgent and growing community needs – by loosening or eliminating restrictions on grants, reducing the burden on nonprofits, increasing transparency in decision making, committing to listening to communities that are least heard, and supporting policy and advocacy efforts.

**Where do we go from here?
How do we take the lessons
of this critical time and
move beyond short-term,
incremental change to truly
reimagine grantmaking?**

A movement is rising, spurred by the dawning recognition that powerful declarations are powerless, unless bold words are followed by bold action.

In this edition, we amplify the voices and programs of some of the changemakers who are challenging philanthropy's long-held notions of risk, trust, and equity, as they chart a better way forward through transforming their grantmaking practices. Listen in as they challenge you to do the same. [▲](#)

Betsy Reid and Melissa Sines



Featured on our cover, and throughout this issue, is art from Amplifier, a nonprofit design lab that builds art to amplify the voices of grassroots movements. Working with a community of social change partners, they commission new art from a deep portfolio of artists, then distribute it through “creative space hacks” to reach new audiences and drive real change. Learn more at [Amplifier.org](https://amplifier.org).

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PEAK's executive team offers much gratitude to our guest editors, Jane Ward and Cristina Yoon, for their partnership, guidance, and support in the development of this issue. Read their thoughts below on the importance of boldly and courageously committing to more equitable grantmaking. – Satonya Fair and Dolores Estrada

To paraphrase an old saying:

If you want to make the grants management gods laugh, tell them your plans.

I entered 2020 thrilled to introduce the Meyer Foundation's new grants process. Over the course of a year, I had led the development of a new racial equity-informed approach to grantmaking that centered our partners, supported systems change, and increased efficiency for all involved. What got us there were deep consultations with our community (grantee partners and declined applicants alike), dozens of conversations with other trust-based philanthropists (thank you all!), and too many flip charts, post-its, staff lunches, and board discussions to count. We edited and re-edited all the digital collateral; we even migrated to a grantmaking technology. Meyer had moved into the racial justice funding space several years prior and, finally, our accompanying grants process would provide us with the trust-based, streamlined approach necessary to shift power meaningfully.

Two months later, in the face of burgeoning health and economic crises and mounting racial injustice in our communities, even our shiny new approach to grantmaking wasn't enough.

In fact, much of what we'd planned came crashing down only weeks after COVID-19 hit. We quickly pivoted, dropping most of the new processes we'd put in place in favor of automatic renewals with no application requirements, contingent payments with no contingency requirements, and early payments upon request, as well as eliminating reporting requirements, deploying additional rapid-response funds, and providing capacity building for partners thrust into digital organizing. Like so many other funders, we threw off all the trappings of our carefully constructed grant requirements – truly saving time and effort for all involved.

Now, we prepare for 2021 as best we can. Given a very uncertain future, I'm sure of one thing: My colleagues and I are more committed than ever to a radical transformation of power in philanthropy. As Angela Davis said, "Radical simply means 'grasping things at the root.'"

For us, that means that, should circumstances once again stop us in our tracks, we will be ready to dig even deeper; that we're dedicating ourselves to constantly reflecting and evolving, as an institution and as individuals; that certain practices which were a part of our early 2020 rollout are gone for good; that as we continue to make plans, we must aim for something better and bolder.

I am grateful to be a part of a committed group of peers in PEAK Grantmaking who continue to push me to take more risks and build more trust. Guest editing this Journal has helped me rise to the challenge of re-envisioning Meyer's grantmaking (again). I hope it will do the same for you.

I look forward to the critical conversations and proactive planning this issue will spark, and to the radical transformation that will occur when the next inevitable obstacles arise. ▲



Jane Ward, Grants Director, Eugene and Agnes E. Meyer Foundation and PEAK Grantmaking Board of Directors member

For far too long, injustice and inequity have disproportionately impacted underserved communities. The COVID-19 crisis and the killing of George Floyd, and many others, have laid bare the stark consequences.


While justice and equity have been the longstanding pursuit of philanthropy, this moment feels different – a time of real reckoning in which philanthropy is finally ready to reflect, learn, change, and act with urgency.

Hundreds of foundations have stepped up to meet this unprecedented moment, fundamentally changing their processes and practices to be far more responsive and grantee-centric. For our part, the Skoll Foundation committed to quadrupling its grantmaking in 2020, targeting much of it to direct COVID-19 response and to support Skoll Awardees with targeted emergency funding. The Foundation also introduced measures to help Awardees and grantees through this period and to reduce grant-related burdens on them: loosening or eliminating the restrictions on active grants, providing unrestricted support whenever possible, offering no-cost extensions, accelerating future scheduled payments upon request, and suspending grant reporting requirements through the end of 2020.

But there's much more we can and should do. Once the "novelty" of this crisis has worn off, we in philanthropy must dig in and double-down on our efforts to avoid backsliding into pre-COVID and pre-George Floyd days. We must acknowledge and tackle the bias and inequity that are embedded in our grantmaking processes and practices. Instead of making nonprofits bend over backward to fit foundations' idiosyncratic ways, we should go above and beyond to support nonprofit organizations and

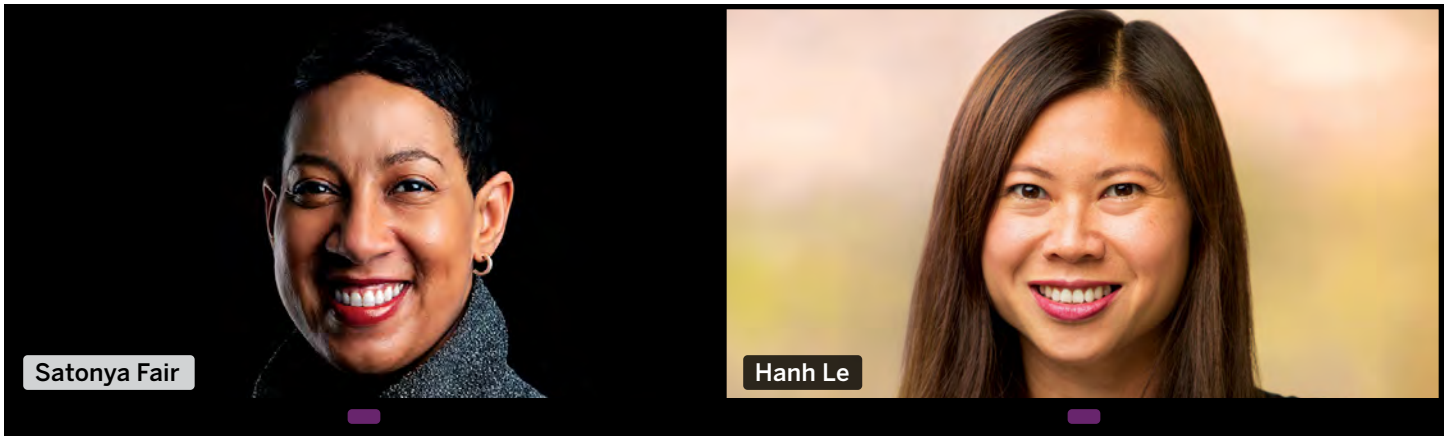
provide what Vu Le coined as "MYGOD" – multi-year general operating dollars – while also investing in Black- and indigenous-led organizations.

I came into philanthropy quite by accident, and I view my responsibilities as a privilege. I ask myself how I can use my position, resources, and voice to help make this world more just and equitable. I also question how foundations can use their financial resources, networks, and influence – and do so collectively – to make this world more just and equitable. Yes, we are facing some of the toughest and most entangled problems of our time. But they're also rich opportunities for us all to work smarter and faster together, by putting equity, trust, and risk-taking at the center of everything we do – not only because we have the privilege to do so, but because we have a deep responsibility.

As a society, we ask essential workers to put their health on the line to protect us all; we ask Black and indigenous people to put their lives on the line for justice. So what are foundations willing to "risk" for the future we want? In too many cases, foundations continue to over-index on the risk to their endowments and under-index on the risk of inaction. But if we don't change that, some of the most essential frontline organizations won't exist next year. I would argue that perpetuity can wait; the time for action is now. Let's fund and support organizations like our lives depend on it. 



Cristina Yoon, Senior Director of Grants Management, Skoll Foundation



Taking a Bold Stand at the Weissberg Foundation

The *Journal* is excited to launch a conversation series featuring PEAK’s new President and CEO **Satonya Fair** and members of the PEAK community, speaking one-on-one about top-level, of-the-moment challenges and the operational strategies being deployed to meet them.

For the first edition, Fair spoke with Weissberg Foundation Executive Director **Hanh Le** to find out how they’re operationalizing a re-commitment to racial equity and justice.

In 2017, Weissberg rolled out a strategic framework that centered equity for marginalized populations, revising it in 2019 to “more boldly and explicitly center power-building to dismantle systemic racism.” As the events of 2020 – and in particular, the killing of George Floyd – drove nation-wide attention to the persistence of injustice and inequity for Black people, as well as other communities of color, Weissberg has been able to take an outsized role in the philanthropic sector’s response.

In the conversation below, Le shares the details of their reframed approach, the trust-based practices they’ve put in place, the advocacy work they do with other funders, and more.

Satonya Fair: At the Weissberg Foundation, you have very explicitly centered power-building to dismantle structural racism. That’s a huge opportunity, but it’s also quite a big risk. We wanted to hear from you about this bold step, and how that’s playing out for you.

Hanh Le: People think of it as a risk, and maybe it was – but maybe not how people might think. We at the Weissberg Foundation were probably more a risk to new grantee partners, community partners, and other funding partners who have been in this space long before we were. We’re the new kids coming into it: We were untried.

We needed to build trust for it to work, and also to be aware of past trauma that philanthropy – the Weissberg Foundation ourselves, and certainly philanthropy as a sector – has caused nonprofits. We’re responsible for that. It might lead people not to trust us, and fairly.

“We think about trust not just externally... but also within our staff, within our board, and between them. If we don’t have trust internally, it impacts how we show up in community.”

Fair: I think that perspective on trust speaks volumes for you as a partner. Can you talk about how you have tried to operationalize that commitment to building trust? How did you bake it into the system?

Le: For us, operating with trust is a matter of both values and practicality. If we truly value people, then we need to engage with trust. Remember that philanthropy literally means “love of humanity.” Trusting someone is demonstrating

love. I'm not saying it's easy – it's certainly not, because we all bring baggage and biases and other things to relationships.

We think about trust not just externally – with our programs and grantmaking, and our strategies of amplification, building capacity, and collaboration – but also within our staff, within our board, and between them. If we don't have trust internally, it impacts how we show up in community. We're a small staff. We have four staff members and seven board members. Operating with trust means being less burdensome, to our grantees and to ourselves, our staff.

Externally, one of the things we did was cut down on reporting that's only seen by us. If one of our goals is amplifying grantee partners, why don't we just have them write a blog post? It's reporting that we can share more broadly in hope of lifting their visibility.

Another trust-based practice: We do the homework, in terms of due diligence, instead of putting that burden on grantee partners and applicants. Maybe it takes up more of our time, but we're learning more from it. The questions that we ask are going to be more informed and more nuanced because of it.

Another example: We were wondering how to do our summer site visits this year – how to pare down what we want to ask, so that grantees don't feel like they have to come up with a whole presentation. We decided to borrow the Libra Foundation's three questions: "What are you excited about? What keeps you up at night? How can we show up better?" And the conversations have just been so rich.

Fair: When I look at traditional reports, there's often not a lot there – it's all about what we already said we were going to fund, right? Trying to move into that conversational approach is really innovative.

I saw the announcement of your 2020-2024 grantees. Tell us why multi-year grants have been your strategy for funding.

Le: Primarily, it's because we fund social change work. Narrative change, cultural change, policy change, systems change – that takes a long time. Even four years isn't enough: If we're serious about supporting systems change, then we need to provide sustained funding over time.

It's also easier for our grantee partners: They can focus on their core work as opposed to grant funding.

Hopefully, it's better for us: more streamlined, giving us more capacity to focus on our ABC strategies, which are also fundamental to who we are and what we do: amplification, building capacity, and collaboration. The less time we spend on paperwork, due diligence, compliance, all that stuff, the more time we have for ABC strategies, which are a better use of time.

Fair: That is a thoughtful strategy considering all the things grantees have to do to run a responsible nonprofit, and to be responsive to other funders. I think, sometimes, funders forget that there are other investors that grantees have to manage.

Le: That's why we do the ABC work – not just for our grantee partners, but to move the philanthropic sector forward.

"If I can convince other donors to engage in trust-based practices, or streamlining, or centering equity, then the burden that they put on grantees is going to be less as well."

Le: Exactly.

Fair: It's a strategy that works for a small staff, and it makes total sense for what your outcomes are. But it's still innovative, and some will see it as risky.

Le: The reality is that no organization is guaranteed to exist in perpetuity. We had a theater grant program that started with a cohort of six grantees, and by the end of the cohort, one of them no longer existed and one had paused operations. Would I say

that those were two wasted grants? Absolutely not.

It's never wasted money. It went into something, and that something is typically people – whether it's people served or the people doing the serving. If the staff and the board are now working at another theater or at another nonprofit, that is not lost capacity-building or knowledge. It's not a loss that we were able to help support paying staff for three years.

"It's never wasted money. It went into something, and that something is typically people – whether it's people served or the people doing the serving."

Fair: I am so impressed with the fact that this small family organization, which began long ago, is very much focused on equitable outcomes. So you're really not making a pivot: This is who you all are. How is Weissberg helping other family foundations take their own risks around equitable outcomes and DEI?

Le: It's a core part of our strategy, to influence other funders. And again, we don't see it as risky. Others might. We see the risk more to Black, indigenous, people of color – and all of us – if we're not working towards racial equity and justice. What's at stake is our lives, our humanity, our community.

If I can convince other donors to engage in trust-based practices, or streamlining, or centering equity, then the burden that they put on grantees is going to be less as well. We alone are not going to make the difference. Moving philanthropy to operate more equitably: That has an outsized impact.

Fair: That resonates so much with me. Why keep doing annual grants, or two-year grants, when you know you're in it for the long haul?

It might be risky in the sense that it's hard, and it could be messy and traumatizing, and potentially damaging to egos and relationships. But that's a risk that we feel is necessary. Our board, more and more, is getting comfortable with getting out there as well.

Ten years ago, as a foundation, they were having the conversation, "Should we even have the name Weissberg?"

"It might be risky in the sense that it's hard, and it could be messy and traumatizing ... But that's a risk that we feel is necessary."

But now they know: Our name is an asset. People listen to us, so let's leverage it.

We do a lot of those one-on-one, board-to-board conversations. We also do a lot of writing on our own blog, and when we're asked to write for others, or engage in interviews, we're happy to. It isn't separate from our work. It's a core part.

Fair: What are some of the common things you hear from organizations as they consider their own transitions?

Le: Staff is typically further ahead than the board. Not always, but in many cases – just because the staff is living and breathing this every day, out in the community. But the board is often willing – or would be willing, but staff has to move on it. They can't wait on the quarterly board meeting.

So how do you make sure that gap – in terms of knowledge, buy-in, understanding – is not so huge that staff are constantly waiting on the board in order to move forward? In whatever it is we're talking about: impact investing, racial equity, trust-based practices.

Fair: We were just talking about that gap between board and staff: figuring out how to educate the board to get them where the staff are. It can be painstaking, particularly when your staff is small, but you don't want to lose your board. We need them engaged.



At a May 2020 convening, Weissberg brought together its *Disrupt, Move, Voice Power* and *Reframing <Washington>* grantee partners for a cohort-building convening facilitated by Richael Faithful. Tapping the power of art, visual facilitator Claudia Lopez (On the Right Mind) developed this visual to connect the dots and help bridge future conversations.

Le: Absolutely. There's this desire to get board members and trustees out into community and reviewing grants, but also to provide anti-racism training so that they are not showing up in ways that harm grantee partners and re-traumatize them. I was nervous about that when I first started, and someone said, "Hanh: Prepare for it, pivot, et cetera. But you can't not do it."

Fair: That's it, you just have to do it. It's a delicate place and space for our country, for our world.

Recently, Weissberg published a blog post inspired by Nat Chioke Williams, the executive director of Hill-Snowdon Foundation, that recommends being very specific in your ally-ship with Black leaders and with this justice movement. How do you plan to, as noted in the piece, amplify, conspire with, and hold yourself accountable to Black justice leaders?

"This is where intention and impact get messy. When COVID blew up, we knew we just needed to stay out of the grantee's way, but make it very clear that we have their back."

Le: Again, this boils down to trust-based practices which are centered on equity, like providing Black-led organizations doing power-building work in Black communities with unrestricted, multi-year funding. What better way to amplify, conspire with, and hold ourselves accountable than walking the walk?

Also, I know this is where intention and impact get messy. When COVID blew up, we knew we just needed to stay out of the grantee's way, but make it very clear that we have their back.

Fair: Coming from a Black-focused, Black-led grantmaker, we were overwhelmed with our own phone calls. As the person responsible for the funding, I advised, "Nobody call anybody. Every nonprofit is so overwhelmed right now, they literally cannot answer the phone." Instead, I just sent love notes: "We are so happy to be a funder of your organization. Anything you need, we're here."

You were already at this work, so you could really go to amplification, not learning, which is where a lot of people are.

Le: We're not perfect. I look back on some of the emails we sent to grantee partners that were meant to be like, "No pressure." But why did we use so many words? And of course there's pressure: We sent them an email. So we're still learning and holding ourselves accountable.

Again, other funders in the DC area have been committed to supporting Black movements for much longer than we have. We have learned so much from, and are so grateful to the Black foundation leaders in the DC area, like Nat Williams, like Yanique Redwood at Consumer Health Foundation, and Rubie Coles, who was with the Moriah Fund and is now at Diverse City Fund.

Several of us have created a collective for funders, Resourcing Radical Justice, which grew out of a joint statement that we issued on COVID as a racial justice issue, asking for philanthropy to support, explicitly, the BIPOC-led organizations

that do power-building work and which are now stepping up to [provide] mutual aid and direct service in addition.

As we were saying, it's so important for funders, and all of us, wherever we are on this journey, to continue learning about what it means to be anti-racist, and to do racial justice and racial equity work. At the same time, we need to act.

Looking at this moment – where we are in terms of racial justice, and COVID, and the movement for Black lives – we're asking funders who aren't supporting this work to really step up and commit.

Fair: Right. Because there is funding and then there is doing.

Talk to us about your perspective on advocacy and why that's important, not only for Weissberg but the sector as a whole.

"If we are committed to equity and justice, we want to be sure that what we say using our platform, which is a privilege, serves the advancement of equity and justice."

Le: The reality is that – because of what philanthropy is, where its wealth came from, and who controls it – people listen when funders speak, for better or for worse. Because there's often funding or support tied to [what they say].

And so, if we are committed to equity and justice, we want to be sure that what we say using our platform, which is a privilege, serves the advancement of equity and justice. If we don't speak up, and turn up the volume of other voices who aren't often listened to, then I feel like we're squandering that privilege.

We're also recognizing that in addition to building, sharing, and wielding power, we need to ask ourselves what power we're willing to cede. I think that's the next frontier for us as a foundation and philanthropy.


Fair: Absolutely. When we talk about narrowing the power gap, something has to be given up, too.

I remember nine years ago, being in the room when Aaron Dorfman from the NCRP started talking about funders ceding power, and people just got uncomfortable. People left the room.

Le: I was uncomfortable!

Fair: Right? To be in that room the first time he did a big presentation about these power dynamics, and some of the other things about where our money comes from – and now, to look at where we are.

Le: It's amazing.

Fair: There's power in nonprofits and power in PSOs, but it's huge to have funders stand beside us, and align with us, around equity. And that's why we wanted to have this conversation with you and the Weissberg Foundation. Thank you for speaking with us today. 

Grantmaking Practice Changes: For the Movement, or Just for the Moment?

Curated by
Melissa Sines

In two major surveys, conducted in 2020, hundreds of grantmakers weighed in on how they have changed their practices in response to our national crises, and how these changes might impact their longer-term approach.

The good news: Many have adopted a range of more flexible, responsive practices. What concerns us: Far fewer report implementing changes that explicitly advance racial equity, and those who do cite a lack of internal policies and frameworks as a key barrier in pursuing them for the long term.

How grantmaking practices shifted from March to May:

A joint report from PEAK and Exponent Philanthropy, based on surveys from both organizations, revealed some positive changes related to grantmaking strategy and practice in the first three months of the COVID-19 pandemic:

- 67%** reduced application requirements and implemented more flexible requirements
- 64%** eliminated or reduced reporting requirements
- 62%** altered their typical process for grant decision-making
- 57%** converted existing project grants to operating grants
- 50%** plan on increasing their payout in 2020
- 30%** moved from paper-based to electronic payments

Many grantmakers are being more collaborative, both in seeking and giving guidance outside of their own board and staff:

- 77%** had open and transparent conversations with grantees about the risks they are facing, and their impact on program delivery and overall sustainability
- 48%** contributed to a regional or national rapid response fund
- 46%** surveyed grantees or their community to help anticipate emergent needs
- 30%** engaged in thought leadership by writing or sharing information about changed processes

Fewer are engaged in deeper work in response to the crises:

- 18%** included equity as a primary driver for grant decision-making
- 9%** shifted dollars into advocacy work to promote long-term system change to better address the next crisis

The practice shifts grantmakers expect will last:

Going forward, a majority plan on providing more general operating support and improving communications:

- 69%** will continue holding open and transparent conversations with grantees about the risks they are facing, and their impact on program delivery and overall sustainability
- 53%** will offer general operating support instead of project support
- 47%** will reduce application requirements or implement more flexible requirements for rapid funds

However, most have not committed to sustain these practice changes in the long run, only short-term:

- 39%** will survey grantees or the community to help anticipate emergent needs
- 36%** will eliminate or reduce reporting requirements
- 29%** will include equity as a primary driver for decision-making
- 29%** plan to include a certain percentage of contingency funding in their annual grant budget
- 26%** will keep changes to their decision-making processes
- 13%** will shift dollars into advocacy work to promote long-term system change to better prepare for the next crisis

Download **COVID-19: How Have Funders Changed Their Approach & What Will Stick?** at peakgrantmaking.org/covidreport

Four months later, another large-scale survey was fielded by the Council on Foundations, Philanthropy California, and Dalberg Advisors on shifting grantmakers, and reported that the trend continues.

Shifts in grantmaking practices from March to September:

A majority are giving more, and being more flexible in their grantmaking practices:

- 85%** reported adopting flexible grantmaking practices for current grantees
- 74%** reported loosening grant requirements
- 60%** are increasing giving beyond planned 2020 levels, with an average increase of 17%

There was also an increase in deeper work around racial equity and diversity, equity, and inclusion, although many reported lacking the internal frameworks and processes to sustain this work:

- 52%** reported that they are actively considering new internal processes around DEI or grantmaking
- 37%** of those adopting more flexible practices or loosened grant requirements are implementing changes with an anti-racism lens
- 20%** of those with endowments are proposing new investment practices, such as mission-related investments or investing through a racial equity lens, to leverage the "other 95%" for redistributing power
- 11%** report that racial equity is now a key or primary focus of their work, compared to the beginning of the year

Download **Shifting Practices, Sharing Power? How U.S. Philanthropy is responding to the 2020 Crises** at cof.org/news/covid-19-resource-hub

ANONYMOUS

You have the power to decide where \$100 million of your organization's funding goes. What do you dare to do?

"I'd find grassroots organizations that are doing amazing work and provide them with enough funding to cover their overhead for the next five years. I'd love to see what they do when they're not worrying about paying the bills, but instead solving important challenges."

"Give it to cooperatives that are led by the people they serve, regardless of 501c3 status or legal status."

"Commit it all to multi-year, general operating grants with minimal reporting. Get the money out the door and be done with it!"

"Utilize it for one purpose; not a multitude of grants."

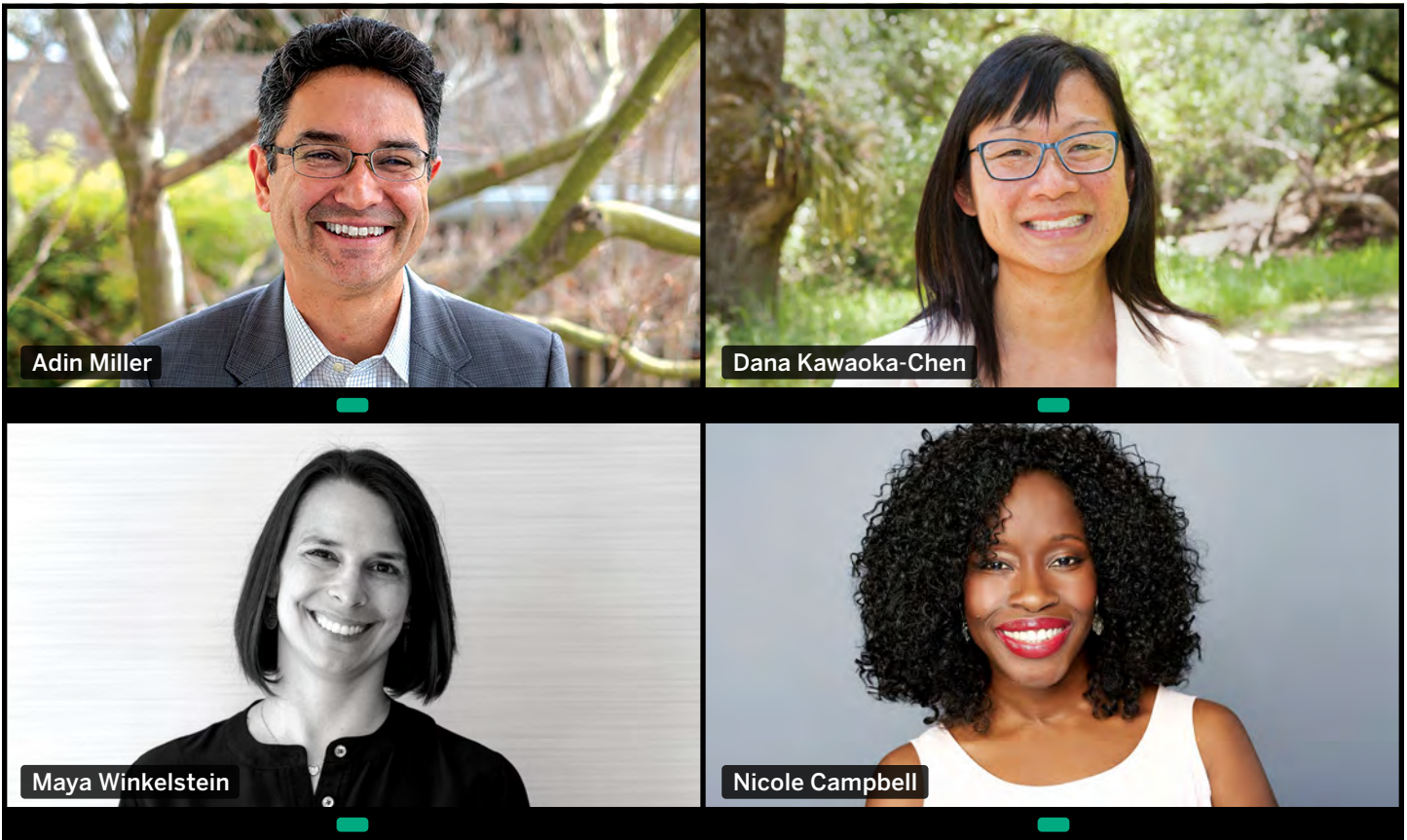
"I would provide long-term funding streams to support leaders of color and fund POC-led start-ups that are already doing amazing work toward our mission. Ask them what else they need, then get out of the way."

"Increase co-investment strategies with community-led or -driven initiatives and increase support of policy and advocacy work."

"I would funnel it into addressing the single most important infrastructure issue at each organization. It would be wonderful to see how the right technology and tools could propel them forward."

"Identify a mission area that is critical and typically underfunded. Gather a community of people who are personally affected to decide where the funds should go — and give them an honorarium for doing it."

"Create a diverse community review panel to decide who receives funding, without final board approval."



A Conversation on Risk, Trust, and Equity in Philanthropy

The idea of “risk” in grantmaking is pervasive. A critical factor in reaching awards decisions, it’s also a stand-out feature of the traditional philanthropic approach that has come under intense fire for its long-standing exclusion of smaller, grassroots organizations – the kind that are often led by BIPOC and devoted to the neighborhood-level work that is so badly needed.

Part of the problem is the slipperiness of the term, as it’s used in philanthropy: Without a functional and universally-accepted definition, “risk” provides cover for any number of implicit biases – a way to scuttle the development and practice of trust, and short-circuit efforts to build equity.

Recently, we asked four members of the PEAK community to delve into the ways “risk” has been misused, its potential for rehabilitation, and the encouraging ways that we are already reframing it in the wake of 2020’s multiple overlapping crises. Following are highlights of the wide-ranging discussion, with a number of insightful ways to reimagine “risk” for the betterment of the sector and its grantee partners.

Adin Miller, Executive Director, Los Altos Community Foundation (facilitator): How do you define risk in philanthropy?

Dana Kawaoka-Chen, Executive Director, Justice Funders: I think risk is one of those words that seems innocuous, but actually has a bunch of coded meanings.

When we talk about risk, we're really referring to whether we've made good or bad decisions about who or what to support. Either way, it's not necessarily risky. But it's framed as risk – as if the stakes we experience *resourcing* work on the ground are the same as those experienced *by* the folks on the ground: those putting their bodies on the line.

The conversation about risk gets framed so that our potential loss of resources is somehow more important than what we are losing in our future. In the context of climate change, in the context of growing wealth inequality, what's at risk is a world that works for all of us.

Maya Winkelstein, CEO, Open Road Alliance: I'm going to take a bit more of a pedantic approach. Because we haven't taken the time to understand, collectively, what that word actually means, I think risk means whatever the heck you want it to. We use it the same way we used the word "impact" 15 years ago. It means nothing.

Another confusing factor is that grammatically – if you look it up in the dictionary – there's actually two definitions of "risk." One is a verb – the idea of risk-taking that Dana spoke to; that is, equating risk with a "good" or "bad" choice. The second definition is risk as a noun, which is simply a measurement of uncertainty; "What could go wrong and how likely is that to happen?" If we start with what it actually means – risk as a measure of the objective uncertainty, and the choices we make around that uncertainty – I think we could develop something very meaningful.

Nicole Campbell, CEO, Build Up Advisory Group: Of course, different organizations have different risk appetites. But I think what's important is realizing that, because we're not holding anyone accountable to a particular definition, risk is defined by the person making a determination. To me, this is what most people define as risky: "It's different. I don't understand it. I can't justify the difference. I don't trust it."

Winkelstein: Risk *can* be an incredibly sophisticated metric, just like measuring impact. Right now, though, risk is just a measure of comfort: It's how comfortable someone is with whatever they're looking at, on a very personal and subjective level – whether that's an impact framework, or a leader, or a participatory decision-making model.

Miller: So the term "risk" is very, very porous. Is there a different term that you have embraced that better reflects the work, or how you have positioned your organization? Is there a better term?

Winkelstein: We've struggled with this a lot. We've got to come up with some way to separate the subjective side of risk – our bias, our comfort – from the objective reality that the world is unpredictable, so we can then decide how to deal with unpredictability.

"The first step is to own it. We have to say, 'When we use the word risk, it means lots of different things, and in large part, those things are implicit biases.'"

–Nicole Campbell

when we use this word? If the value is to keep wealth within the organization, that creates conversations oriented around the protection and accumulation of wealth, versus deploying resources back into the hands of communities where that wealth was extracted.

Winkelstein: I agree. Risk is everywhere. It is constantly changing. As long as there is an unknown, there will be risk, and it will take different forms. So, getting underneath the statement "that's too risky" requires a radically honest conversation: What do you actually care about – money, impact, reputation, legacy? And if you had to prioritize them, how would you? If you go through that exercise, it's going to reveal not only your risk

"If philanthropy redistributed its resources to the community and let them govern where those resources are deployed, we might learn something different about risk."

–Dana Kawaoka-Chen

Campbell: I think that the first step is to own it. We have to say, "When we use the word risk, it means lots of different things, and in large part, those things are implicit biases." Until we're willing to have that very honest conversation, where we can be vulnerable enough to discuss how we can change, we're going to be dealing with the same situation.

Kawaoka-Chen: What is the value set that we're applying

when we use this word? If the value is to keep wealth within the organization, that creates conversations oriented around the protection and accumulation of wealth, versus deploying resources back into the hands of communities where that wealth was extracted.

Winkelstein: I agree. Risk is everywhere. It is constantly changing. As long as there is an unknown, there will be risk, and it will take different forms. So, getting underneath the statement "that's too risky" requires a radically honest conversation: What do you actually care about – money, impact, reputation, legacy? And if you had to prioritize them, how would you? If you go through that exercise, it's going to reveal not only your risk profile, but your values, your approach, and where you are coming from. That can start to give you a road map of the behaviors that you need to adjust.

Kawaoka-Chen: Our friends at Movement Generation say that "the heart learns what the hands do" – meaning that you have to change practice before you can change attitudes and beliefs. If philanthropy redistributed its resources to the community and let them govern where those resources are deployed, we might learn something different about risk.

Miller: Dana, can you tell me a little bit about Justice Funders' guide to social justice philanthropy, The Choir Book, and the practice recommendations that come from it?

Kawaoka-Chen: Our belief is that you can make changes happen across an institution irrespective of your positional power, within the domain of responsibility that you oversee. For instance, what are some of the practices that grants managers have the ability to change that creates more values-aligned practice for the organization?

For an applicant or a grantee, a philanthropic institution's values are reflected in how they experience a grant application or a grant award or a grant implementation process. So are the practices you use to ask for information rightsized for the kind of award that you are giving? Can you obtain information in ways that don't place that burden on your applicants and grantees? Is the language clear around what it is your foundation supports? That could look like overhauling the reporting that you're doing, or changing the due diligence process.

Winkelstein: One frame that can position risk as a positive – something that can actually help with the due diligence process – is to define 'risk' specifically as risks to impact.

Imagine if due diligence included all of the barriers that could get in your grantees' way, and how you as a funder could help remove them. As opposed to a grading exercise, "I'm going to give your application an A or an F," we can refocus by saying, "Look, we're both here because we want impact. The biggest risk is not achieving that. So how can we both maximize the chance of success?" That frame puts funders and grantees on the same side, rather than in an oppositional relationship. If you position risk in terms of impact, you can see that, for example, one of the biggest things that get in the way of impact is not having sufficient cash flow. By identifying that as a clear, objective, identifiable risk, it makes it obvious, and easy, to say, "We're going to release the money whenever you need it – you tell us. We're going to set our grant cycles according to your cash flows, not the other way around."

"Imagine if due diligence included all of the barriers that could get in your grantees' way, and how you as a funder could help remove them."

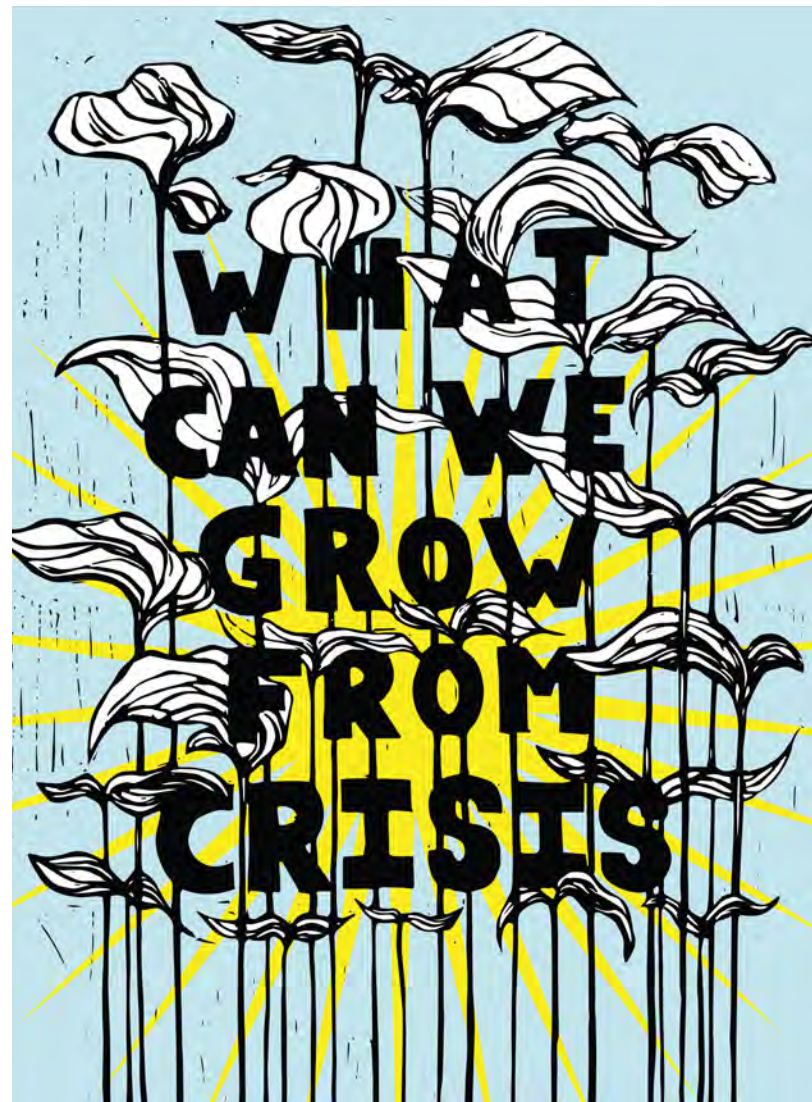
–Maya Winkelstein

Miller: Something I noted, once the pandemic really set in, was some organizations moving in that direction just because of need – as a way to streamline their process. To clarify this point: Would this apply to the ongoing evaluation and reporting, as well as the intake process?

Campbell: Values show up throughout the entire process. It's the monitoring and evaluation, the reporting, the application process, and even the way that you're awarding funds.

Imagine if we provided general support and, along with that, capacity-building resources. Can we talk about what is preventing us from getting to that point? To me, that is where all of that implicit bias sits: all of the assumptions, all of the definitions of risk that we're bringing to the conversation.

Kawaoka-Chen: I think part of the challenge here is that, often, a philanthropy's theory of change is rooted in the stance of a particular donor or set of trustees or board members, and not in the communities they are serving. The [grantmaking] process reinforces implicit bias, and the accumulation of power and wealth, because the theory of change is situated to serve the institution.



Pete Railand for amplifier.org

Miller: Is it disingenuous to say that philanthropy seems to be very data-driven, almost to the point of being clinical? Does it need more of a value-based, people-centered approach?

“Trust is not formed by numbers. Loyalty, which is an extension of trust, is not informed by data. It’s informed by relationships, by person-to-person connection.”

–Maya Winkelstein

If you are relying only on the people you know and trust, that’s often going to lead you to a non-diverse outcome.

So I think you have to have both: using processes as guardrails, and as reminders to correct our unconscious impulses, but not letting them take over to the extent that you then devalue trust and, dare I say, common sense.

Miller: What are your closing thoughts in terms of the immediate next steps for the field? What would you encourage us to think about?

Kawaoka-Chen: In terms of racial reckoning, in terms of thinking about who this wealth actually belongs to, philanthropy has an enormous opportunity to rethink the way these resources can be deployed so that the communities from which wealth was extracted can govern it. What’s before those of us in philanthropy, individually, is to think about how we do that from whatever perch we sit upon. It’s also getting going, understanding that the risk for philanthropy is *not* deploying all the resources we have at our disposal to address the interlinked crises of the economy, climate, and democracy amidst a global pandemic.

Winkelstein: I think you’re onto something there, to put it mildly. Trust is not formed by numbers, right? Loyalty, which is an extension of trust, is not informed by data. It’s informed by relationships, by person-to-person connection. So yes, of course, we need to form those relationships.

But the hesitation that I have in throwing out systems designed to bring consistency and rigor – to go all “heart” and lose the “head” – is that we also know that relationships are where bias is born, for good and for bad.


“I would love to see us redefine what we consider to be ‘big bets’... to really benefit grassroots organizations. Can we start placing big bets on them?”

–Nicole Campbell

impact sector is not immune.” I don’t think I’m ever going to have to say that again. COVID has shown us in the darkest, harshest ways what true risk looks like: risk to impact, risk to life, risk to organizations that have been around for decades. The very fabric of the sector is at risk because of COVID and the political, economic, and social effects.

I think it’s a crisis that we should take advantage of: an opportunity to say, “We’re all on the same page. We get it now. So what do we do?” As you said, Adin, a lot of foundations have been forced to do these things in response to the crisis, whether it’s moving to unrestricted support, suspending reporting requirements, providing advance dollars, putting out more funds, or just accepting that you’ve got to trust your grantee to figure it out and tell us what’s happening.

I think the most important thing to do is not let it go: Don’t drop those emergency grantmaking budgets in 2021, don’t dismantle that emergency board committee that you put together to improve your COVID grants. Don’t dismantle the culture that you had to create in a matter of weeks, when your foundation was saying, “Program officers, just solve it. We trust you. Talk to your grantees. Figure what they need. Make sure this impact isn’t lost.”

Instead of dismantling what we have built, let’s reinforce it. I think that will move us a long way. 

Campbell: I would love to see us redefine what we consider to be “big bets,” and the relationship between innovation and risk, to really benefit grassroots organizations that are doing much of the work for under-resourced and marginalized communities. Can we start placing big bets on them? Can we envision a world where that is normal?

Winkelstein: For the last eight years, one of our banner messages has been, “The world is unpredictable, and the

ANONYMOUS

What bold move do you wish your organization would make, but is too cautious to undertake?

“Let go of some bureaucratic functions and office space to save up more money for beneficiaries.”

“Stop funding ‘issues’ or ‘topics’ and start funding movements, leaders, and communities.”

“Be serious about racial equity and reflect it in internal and external processes.”

“Throw out our current grant review process, which has become overly cumbersome and time-intensive for staff and applicants, and do a major overhaul which incorporates real learning, grantee involvement, and flexibility.”

“Change our board so the members are directly from the communities we support.”

“Move into a 10-year spend-down mode and move funds to POC-led organizations so they have all the financial support they need to do their work.”

“How can our investment strategies align with our mission? There’s a lot more money sitting in there than going out the door every year.”

“Double or triple our grantmaking budget! Boldly engage other funders and donors to do the same. Add a 2% contingency to our annual grants budget so that we can respond to important opportunities at the year's end. Allow grants management more final decision-making authority over our grants process.”

Because Change Can't Wait: A grantmaking redesign shifts power at Stupski Foundation



Glen Galaich

In 2015, the **Stupski Foundation** was launched with a plan to spend down their philanthropic assets by 2029 – a pledge that has taken on even greater urgency in the face of the current confluence of crises.

Stupski has also appealed to other grantmakers to join them, citing a “growing movement to redistribute private philanthropic wealth back into communities instead of holding on to funds so their institutions can exist indefinitely.” Preciently, they have asked, “If we are to live our values, we must ask ourselves and our peers: What are we saving our endowments for?”



Gwyneth Tripp

The sharply rising demands of the moment have spurred a comprehensive redesign of the Foundation’s grantmaking process to move funds more rapidly to their nonprofit partners and the communities they serve. As CEO **Glen Galaich** puts it: “Philanthropy is uniquely positioned to act quickly. The only barrier to doing so is ourselves.”



Lalitha Vaidyanathan

In a recent dialog among Galaich, Grants Manager **Gwyneth Tripp**, Chief Advisor **Lalitha Vaidyanathan**, and Design Strategy Consultant **Sacha Thompson**, the team weighed in on the grantmaking redesign process, highlighting their focus on the user experience, building trust, and shifting power – both internally and externally – to face emerging challenges and achieve progress in racial equity and inclusion.



Sacha Thompson

On shifting power – from board to staff, and from staff to community

Sacha Thompson: Our board of directors recently granted the staff broader agency to issue grants, and we wanted the revamped grant process to reflect and support that change. We created a new timeline that gives the grant process more transparency: both staff and grantee partners now understand how long each stage takes, and can manage expectations accordingly. We also included three check-ins with each grantee partner at pivotal points in the process, ensuring time and space for staff to answer questions, offer support, and work more collaboratively with grantee partners.

Our staff cares about building solid relationships with grantee partners; we didn’t want to erode trust and rapport with an onerous grant process. We wanted the process to reflect the partnerships and relationships already established.

Lalitha Vaidyanathan: As part of the new process, we've intentionally shifted power from board to staff, and decided to share power with our grantees in the proposal development process, fostering greater collaboration. For instance, staff now have the discretion to make an award commitment and partner with the grantee to shape it before requesting a proposal.

Gwyneth Tripp: Shifting power this way has made the grantmaking process more feasible and creative. When there are more of us participating, there is more potential to notice where we could make substantial progress, and where we have been limiting ourselves.

It feels like we're all committed to making a different way possible for everyone. That meant taking a risk: moving away from how it had always been done. We had to find the nodes of established power in the process and work on dissolving them, or redesigning how they showed up, while still retaining the integrity of the process.

On developing the board as a strategic partner

Vaidyanathan: When the board gave staff more agency, I think they were more focused on the outcomes of grantmaking than the process. Their trust gave us the flexibility to design more equitable grantmaking practices.

Many foundations assign attribution at a grant level rather than at the strategy level. That is why most foundations tend to engage the board there. Due to the complex nature of social change, direct attribution at the strategy level is nearly impossible: It is a struggle to articulate to a board that social change has occurred because of something we did strategically. That's the elephant in the room – everyone knows it.

For us, it was a question of finding a way to keep them involved at the strategic level, and not involved in specific grants. As the new grantmaking experience reveals itself, we expect everyone to become more comfortable engaging at the strategic level.

Glen Galaich: In revamping our grantmaking approach, I learned that we were so tied to making executive decisions without clear organizational processes that key stakeholders were often left out, and left confused, which had many negative unintended consequences for our work and our relationship-building efforts.

When you examine your grantmaking process, I encourage you to note each time you hit one of those points where only a few people – or just one person – are making a decision, and consider how you can invite multiple perspectives to increase the opportunity for equitable outcomes, efficiencies, and more. Whenever possible, center the perspectives of the stakeholders most affected by your processes and decisions. The process is new, and the board's role in decision-making regarding shifts in our strategy is evolving. While there is trust, as we go along, they may feel it necessary to ensure their voices are part of the conversation.

On the redesigning process

Thompson: We started by identifying stakeholders and conducting interviews. These interviews served two purposes:

1) to identify the unique obstacles each internal and external stakeholder encounters, and 2) to understand what the ideal grant process would look like. This exercise helped us to identify the values and functions that each stakeholder deems important. These interviews also opened the door for grantee partners to ask questions and gather insight about the Foundation.

We learned that there were several points where our grantmaking process could be more transparent, and we've made changes to reflect that information. I also learned that there is significant value in creating more opportunities and spaces for these conversations outside of the grantmaking process. These types of conversations are a powerful tool for building the trust necessary for great partnerships. I also think it is important that grantee partners see us continuing to learn and improve, and finding ways to invite them into that process.

Tripp: The key to this interview process was building relationships by focusing on what we wanted to accomplish rather than our role or position, or the responsibilities and expectations of any one person. I was able to hear much more clearly when I recast my role, aiming to take in as much as possible rather than filter down, simplify, or come up with a solution.

At the end of one of our interviews, someone shared that they had never been listened to in this way before, and how much it allowed them to share. That was an "aha" moment for me.

Thompson: We also conducted a series of design workshops with our consultants and staff to help us incorporate what we

learned into a successful grant process. We've started a grant process check-in schedule with all consultants and staff: Every three months, the grant revamp team meets with consultants and

staff to discuss what is working well in the process and what is not, and to identify any modifications or recommendations. We hope that this continuous, internal feedback loop will help us to improve.

On continuing the racial equity journey

Vaidyanathan: We are just entering a new phase in our diversity, equity, and inclusion work where we are operationalizing equity, both internally and externally. This is our opportunity to examine all processes – not just the ones where foundation staff may be feeling some pain, as was the case here – to determine if they need to be modified to better center equity.

Galaich: This grant revamp process was the first time a workgroup reviewed any aspect of our internal approach through an equity lens. Going forward, we will take the same approach to all of our internal and external processes, across the organization. It really is a step-by-step and case-by-case endeavor. Some processes will need a new design approach to revise them, which can be daunting. But when you examine and revamp each process, it can also be energizing and uplifting – especially when you start to see, over time, that you are making actual progress. 🌱

Stories From the Field

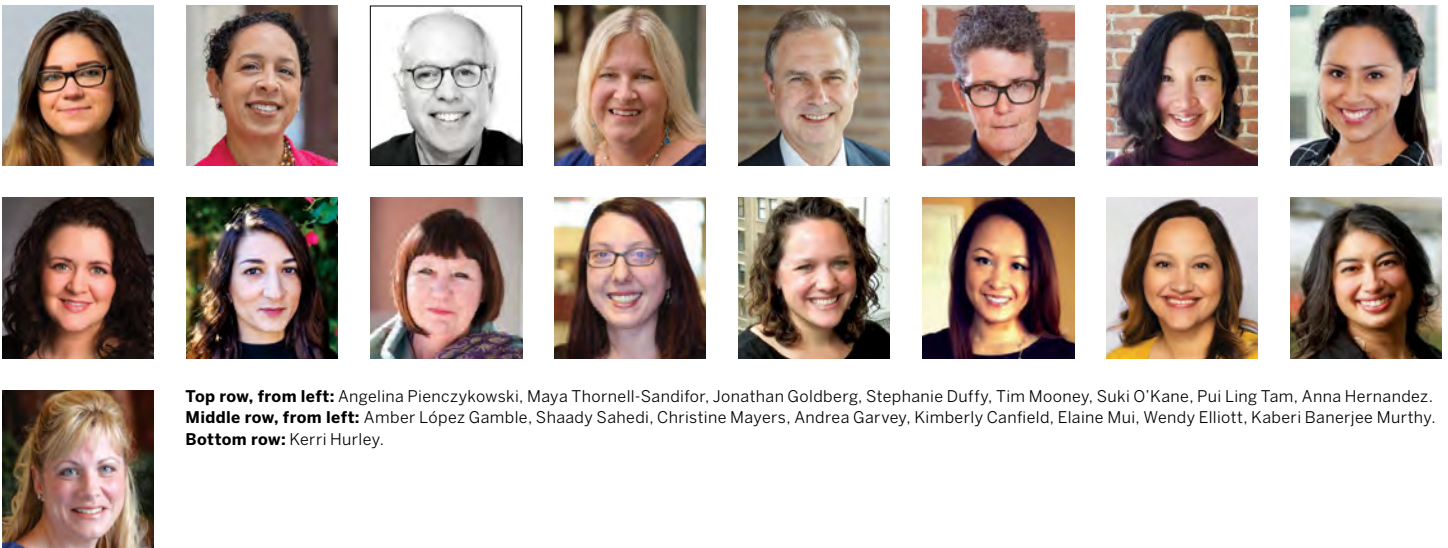
In the PEAK tradition of peer-sharing and -learning, we asked 17 members of our community to share how they are evolving practices – highlighting ways that the conventional wisdom of “how to make grants” is being upended amidst crisis, upheaval, and uncertainty.

Through these stories, four themes emerge:

- The imperative to share power through trust-based philanthropy approaches;
- The urgency for philanthropy to raise its voice through (and by supporting) advocacy;

- A dedication to funding racial and social justice initiatives; and
- Questioning philanthropy’s characterization of their investments: “What about the other 95 percent?”

As you read these reports, consider the possibilities should philanthropy change its notions of risk, trust, and equity. We hope you, too, will be inspired to reimagine grantmaking’s role for the future.



Top row, from left: Angelina Pienczykowski, Maya Thornell-Sandifor, Jonathan Goldberg, Stephanie Duffy, Tim Mooney, Suki O’Kane, Pui Ling Tam, Anna Hernandez.
Middle row, from left: Amber López Gamble, Shaady Sahedi, Christine Mayers, Andrea Garvey, Kimberly Canfield, Elaine Mui, Wendy Elliott, Kaberi Banerjee Murthy.
Bottom row: Kerri Hurley.



Jesus Velazquez for amplifier.org

Going all in to train advocates

By Tim Mooney, Senior Counsel, Alliance for Justice

Alliance for Justice believes that, if foundations want their priorities to get the attention and resources they deserve, it is vital for them to support their grantees in making the case to elected officials and the public. Because advocacy shapes the public debate, it is perhaps the most impactful way nonprofits and foundations can focus their attention to bring real change.

For over two decades, our Bolder Advocacy program has created tools, trainings, and resources for foundations and their grantees with one big goal: to make advocacy easy and accessible for nonprofit and foundation leaders who want to influence substantive policy change. Employing lawyers,

coaches, and nonprofit experts, Bolder Advocacy's work has spanned multiple administrations and national shifts in governing philosophy.

Of course, things have shifted dramatically since the pandemic began.

In these six months, we shattered internal records for the number of calls we're taking, emails we're answering, and webinars we're leading.

Not surprisingly, nonprofit advocates and funders are asking us a lot of questions about how to get involved with economic stimulus efforts, 2021 state legislative sessions, and the upcoming election.

As you read this, Bolder Advocacy is preparing for our 300th nonprofit advocacy training of the year; we did 250 in total last year. And as our trainings and "technical assistance" communications tick up, we're hearing more and more from foundations that want to deepen their support of advocacy, whether that's convening stakeholders or funding their grantees to do more.

Seeing the volume of interest skyrocket is thrilling for us, and heartening for our democracy. Don't hesitate to get in touch: Bolder Advocacy's team of experts is ready to help you move from cautious to courageous, whether you're lobbying, getting out the vote, supporting a ballot measure, or funding grantees' efforts to press for positive change in our communities. [△](#)



BLM fired up at the People's Climate March. Photo by Vlad Tchompalov / Unsplash.

Standing up for justice

By Jonathan Goldberg, Director of Learning and Grant Operations, Surdna Foundation

Now in its 103rd year, the Surdna Foundation is, amazingly, still led by descendants of our founder, John Emory Andrus. During most of its history, Surdna's mission was nonspecific, a common practice at the turn of the 20th century. Until the late 1980s, Surdna's grantmaking centered on education (scholarships), culture (arts organizations, libraries, etc.), and basic community infrastructure (fire engines!).

So how did a white-led family board make the decision to focus on racial equity?

The catalyst was Surdna's decision to revise its mission some 12 years ago. At that time, the foundation's program areas worked independently, without coordination or a common set of goals. It took the board and staff a year to settle on language that captured our ethos and aspirations: fostering sustainable communities in the United States guided by principles of social justice.

It may not be poetry, but naming social justice explicitly proved to be a game-changer. What we didn't know at the time, however, was that we each had different ideas about how much the game should be changed. Finalizing the language of our mission statement was only the first step in answering the question, "What does it mean to be a social justice funder?"

Both by design and by reflex – reacting to the needs of several moments – we next embarked on a series of activities that informed our thinking about social justice and how to learn together: establishing a shared definition of social justice, our vision and values, and organizational outcomes; overhauling program strategies, metrics, and indicators; and launching a system of learning that centers our grantee partners.

Each of these elements – discrete, weighty, and difficult projects all – helped mold the way we approach our work. They have helped make us a more grantee-centric funder, with a deeper understanding of who we are as an institution, where our support is needed most, the power imbalance between the foundation and our grantee partners, and how our internal culture impacts our ability to effect change.

As our work on social justice progressed, we came to understand that the best way to achieve social justice and better outcomes for everyone was to focus on the most vulnerable among us: those who have been systemically denied access to basic human rights and dignity. This led us to center racial equity in our work. (You can see how this all adds up in our core principles, detailed at surdna.org.)

None of this work comes easily. It requires the willingness to confront our differences and our privilege, and to have productively uncomfortable conversations; to provide cultural competency training and space to grow for those within the institution; and, especially in this moment, to act boldly. Sometimes we get things wrong and our mistakes cause harm. This, too, is part of the learning process and requires a process of healing.

Equity, civil rights, opportunity, and human dignity are universal issues no matter what area a foundation is working in. When done honestly, the reward is knowing precisely why you work in philanthropy: to make this a better world for everyone. **▲**



The team at McKnight grantee Minnesota Interfaith Power & Light works in partnership with faith communities to build a powerful social movement for climate justice across Minnesota. Photo courtesy of Minnesota Interfaith Power & Light

Leveraging the other 95%


By **Stephanie Duffy**, Director of Grants and Information Management, McKnight Foundation

Impact investing is a powerful tool for amplifying McKnight Foundation's work as a grantmaker.

Approximately 45 percent of our endowment is aligned with our mission to advance a more just, creative, and abundant future where people and planet thrive. We seek investments that create affordable housing, build the sustainability of our metro region, support small businesses owned by people of color, increase energy efficiency, promote the distributed generation of electricity, or reduce chemical inputs in commercial agriculture.

Early thinking about impact investing framed it as a sacrifice of financial capital for social impact. In our experience, it is no sacrifice. In fact, each of our impact investments has generated a triple bottom line made up of:

- environmental and social returns, by contributing to solutions in inspiring ways;
- learning returns, including deep insight into market gaps, opportunities, and private-sector solutions; and
- financial returns, meeting a targeted goal that meets our fiduciary standards.

Impact investing enables funders to align more of their assets with their philanthropic goals. Most foundations are required by law to distribute five percent of their investment assets each year; through impact investing, they can leverage the other 95 percent to further advance their missions. Additionally, funders can feel assured that their endowments are furthering their grantmaking strategies, rather than working against them. 



Freedom Inc., a member of Schott grantee Dignity in Schools Campaign, holds a public event in Madison, Wisconsin supporting youth, parents, educators and advocates in the fight for #PoliceFreeSchools.

Listening and acting with urgency

By Andrea Garvey, Operations and Grants Manager, Schott Foundation for Public Education


The Schott Foundation for Public Education has been actively fundraising for our Loving Communities Response Fund for Racial Justice to respond to racial justice emergencies – from supporting COVID relief efforts in Black and Brown communities to ensuring the safety of youth of color who have been traumatized, harassed, and overpoliced in our nation’s public schools.

We worked with four national coalition partners – Alliance to Reclaim Our Schools, Dignity in Schools Campaign, Journey for Justice Alliance, and Alliance for Educational Justice – to identify local grassroots organizations already doing the work on the ground; Schott then implemented a streamlined process to move money to them quickly.

Some organizations recommended for funding were already Schott grantees; in those cases, needing no new information, we sent funds right away. For new groups, I created a five-minute grant application, and gave applicants the option to complete it by phone or over email. Even with this truncated process, we’re still capturing the data we need to tell the stories of the students, parents, teachers, and community leaders we support.

In addition to streamlining applications, we’ve sped up our grant decisions, approving and distributing rapid response grants as fundraised dollars become available. We communicate guidelines (e.g. that grants cannot support lobbying) to grantees in our award letters, rather than risk delays using the traditional grant agreement process. Grantees also have the option to receive funds electronically or with a physical check.

In six months of this work, I’ve learned the importance of being nimble, creative, and ready to ask a grantee anytime I’m not sure what to do. The Schott Foundation didn’t need to reinvent the wheel to make this happen: We just needed to trust our partners, ask them what they need, and then get it done.

Each of us, from where we sit in our own organizations, can think of one quick change to implement right now that could save applicants and grantees time; even five minutes is valuable for these extremely busy activists. 



Through Haas's Learning Lab initiative, programs like the Youth Art Showcase emerged, engaging San Francisco Bay Area youth in visualizing "What is freedom?" Their responses are featured on Instagram @sf.youthart, including these submissions by (from top to bottom) Adriana Zhang, Linh Nguyen, Kira Fukuda, Ivan Hernandez, and Hanniaz Elias.

Sharing power across generations

By Suki O'Kane, Pui Ling Tam, and Anna Hernandez; *The Walter & Elise Haas Fund*

Philanthropy has a bad habit of overlooking the voices and experiences of the people most directly affected by grants. The Walter & Elise Haas Fund's new education grantmaking strategy, centered on power-sharing and youth outcomes, gives us the opportunity to correct that.

Our new strategy emphasizes learning, participation, and collective changemaking. To carry it out, we've convened intergenerational, multidisciplinary, collaborative cohorts of youth and adults (in equal numbers), so that together they can think, act, make and test solutions, and help direct the Fund's education grantmaking.



All fund staff, regardless of program focus or role, are welcome to participate in these cohorts, supply feedback, and reflect on how participatory practices can be applied in their work.

What happened when we opened this door?


First, the things one would expect: We tidied up (even during a pandemic); made sure we were on our best behavior

(i.e., youth development principle-informed); provided hospitality (all cohort participants were paid for their time); and made our intentions clear (we named this project *The Learning Lab*).

Then, the unexpected and beautiful: We gained new insights, developed new friendships and new skills, and were honored with the opportunity and privilege to serve as a community resource and as facilitators of action.

We need to hear what youth are living through. For our education grantmaking to succeed, our work must be led by them and their needs. That is – and should be – the value of philanthropy's power, privilege, and resources.

In the Learning Lab, our differences (in age, race, profession, role) provide us with opportunities: to creatively and collaboratively transform inequitable systems, to break through silos and echo-chambers, to alter power structures, and to grow trusting, long-term relationships. Our differences seed future action.

As Melanie Dzib, our Bay Area Youth Community Fellow and a 2020 Oakland Unified School District graduate wrote, "Providing safe and welcoming spaces, such as the Learning Labs, is crucial. Our society otherwise leaves voices unheard and – oftentimes – even silenced. During this pandemic, hope and advocacy for change are more relevant than ever. It's up to us to work towards the improved future we desire and deserve." 



Challenging racism with action

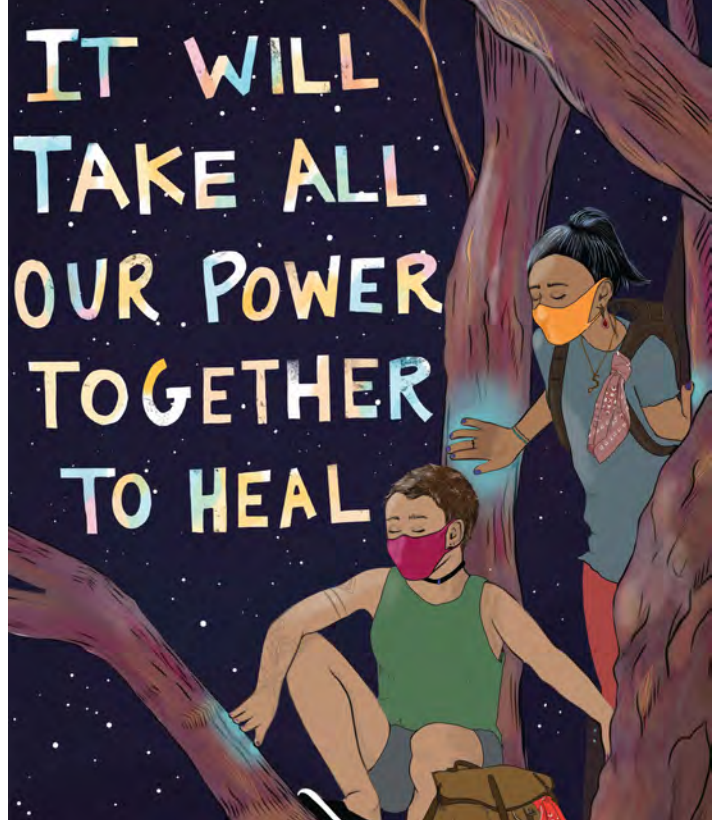
By Amber López Gamble, Director of Grants Management, The California Wellness Foundation

History matters. My grandfather was a quiet man, but he told me a few stories. He told me how he and his sister weren't allowed to attend the White schools. Born in the United States, he was of Mexican descent, and spoke only Spanish until he went to school in a small Arizona mining town. Where he grew up, racism and discrimination against Mexican people permeated everything.

Yes, some things have changed since my grandfather's story of segregated schools, but that change only happened because people named the injustice and went to work to change it. There is a history of racism in every part of this country, and that history shows up today in pervasive social hierarchies, in every aspect of dominant culture, and even in the subconscious of the most "woke" among us.


Words matter. In my 14 years at The California Wellness Foundation, I've seen an evolution in the words we use to describe our work. When I first started, we targeted funding to support the needs of the "underserved" and "low-income." Then, our grantmaking focus shifted to the social determinants of health – where you live, work, learn, and play, and how it impacts health and well-being. Then, we worked to embed DEI – diversity, equity and inclusion – in our work, and started collecting data to help determine whether organizations led by people of color were underrepresented in our grantmaking. Now, our conversations call for racial justice, with an emphasis on grantmaking that addresses systems change and drives justice-informed action.

The disproportionate impact of COVID-19 on people of color, along with the protests against the killing by police of George Floyd and so many other Black people, have forced our nation to acknowledge the unconscionable pain that we allow to carry on by failing to confront systemic racism.



Rue Oliver for amplifier.org

Actions matter. As a health funder, we know that systemic racism makes our vision impossible to realize. While we have to understand history and name racism, that's not enough. We have to ask ourselves, "Where are our dollars going? Do our grantmaking and investments support the status quo? If so, what can we do differently? And how can we use our voice?"

If we acknowledge that racial justice underpins a better world, our grantmaking and investments should show it. Philanthropy can lead in this moment by taking actions that challenge racism. We can fund organizations addressing racial injustice, raise our voices, and use our influence and our full endowment – think PRIs and MRIs – to disrupt systemic racism through targeted investments. We can add to the transformative potential of this moment and bring about change that disrupts cycles of injustice, and unlocks the human potential of all of us. 

It's all about trust

By Shaady Salehi, Director, Trust-Based Philanthropy Project


The Trust-Based Philanthropy Project is a five-year, peer-to-peer initiative aiming to address the systemic and interpersonal power gaps between foundations and nonprofits, and to support funders who are ready to flip the script on that dynamic.

Trust-based philanthropy reimagines traditional funder-grantee relationships by taking a more expansive, relational approach to grantmaking, centered on building trust and partnership, recognizing the inherent power imbalances between grantmakers and seekers, and understanding

how these imbalances are exacerbated by systemic racism and gender discrimination. Our fundamental belief is that philanthropic work is impossible without the leadership and expertise of nonprofit leaders who are working on the front lines of the issues philanthropy seeks to address. If foundations want to be successful in advancing their goals, the work must be approached as a partnership, in the spirit of service.

The convergence of multiple crises in our society has, indeed, demonstrated that the only way forward is to trust in nonprofit and community leadership, to listen and learn from one another, and to embrace trust-based practices that allow nonprofits to focus their energies where they are most needed.

Since March, hundreds of foundations have pledged to make trust-based changes, including unrestricting grants, loosening paperwork requirements, and responding to the needs of those closest to the issues at hand – making significant strides in their journey toward trust-based philanthropy, with demonstrable results.

But this is only a starting point. Looking ahead, let's remember that trust-based philanthropy is most successful, and rewarding, as a long-term strategy of continuous learning and improving. The journey to trust-based philanthropy has many entry points, but at its core is a singular recognition: that trust must be continuously cultivated and nurtured at all levels of our work. In short, it's about both what we do and how we show up. 




When COVID-19 struck, farmers markets, school districts, and restaurants closed, putting many small-scale farmers at risk of losing an entire growing season and possibly their land. With funding from Babcock Foundation, Communities Unlimited, an Arkansas-based community development financial institution serving several states in the Mississippi Delta, launched the Farm to Pantry program, which buys excess produce from farmers and delivers it to 23 food pantries around the region.

They are working twice as hard to help their communities weather the crisis, while continuing to advance justice in the most important political year of our lifetimes.

Certain that this pandemic will reshape our economy and society in fundamental ways, we responded by tripling our grantmaking for 2020. From democracy to policy advocacy to economic opportunity, our partners' missions are more critical than ever. The pandemic is tearing down our current

socio-economic frameworks; with the right kinds of support, our partners are ideally positioned to create a more equitable foundation on which to rebuild.

Even as repercussions continue to manifest, several organizations are already pivoting from despair to opportunity. In this strange new reality, they are figuring out new and different ways to advocate for policies that support low-wealth families, halt deportations, register new voters, encourage census participation, plan for redistricting, and prevent bankruptcies and foreclosures.

Many other foundations have also made significant adjustments, with the potential to imagine a new kind of relationship with our grantee partners: more resources and general support, fewer grant restrictions and reporting requirements. Nonprofits have been calling for these best-in-class practices for years; hopefully we will see permanent shifts in grantor-grantee relationships and power imbalances, leading foundations to become better partners for the people who do the on-the-ground work that advances their missions. 

Why we're tripling our grants

By Christine A. Mayers, Grants Manager, Mary Reynolds Babcock Foundation

Back in March, when the Mary Reynolds Babcock Foundation began to grasp the severity of COVID-19 and its impacts on the people and places we care about, we began to brainstorm ways to mitigate the harm. We asked our grantee partners about the pandemic's implications for their work. We asked the leaders of community development finance organizations how their borrowers are faring. We sought ideas from other foundations taking creative approaches to stanch the bleeding.

What we've heard is dire. Nonprofits are cancelling vital fundraising events and outreach activities central to their missions. They tell us some foundations are pausing their support, even though their grantee partners are not pausing their work.



Fabretto Foundation's education work in Nicaraguan Schools. Photo courtesy of Fabretto Foundation

Trust is our work


By Angelina Pienczykowski, Grants Manager, Tinker Foundation

Building trust is important because it transforms grantees into true partners – and within that trust-based partnership, everyone is accountable to their words and actions, including philanthropy. At the Tinker Foundation, we think of building trust with grantees and community as a responsibility rather than an option.

When you make that shift in perspective, pursuing trust becomes ingrained in your *modus operandi*. Trust becomes your work: building it, maintaining it, not letting it break down. The comparison I always think of is the “trust fall” exercise – where a person (or group) catch you as you fall backward – used for team-building. It requires a strong sense of trust to fall with the expectation of being caught. In a trusting partnership between grantmakers and grantees, you trust in people, their process, and their methods to produce an outcome that meets everyone's expectations. And when the outcome is not what we expect, trust plays a key role in maintaining the bonds that have already been formed.

One of the ways trust shows up in our work is our deliberate choice to fund international organizations that have never received a grant from an international or U.S. funder. We take this risk to help organizations build their capacity to expand the search for support, and to increase trust in their work among other grantmaking agencies.

In addition, we don't shy away from grants that require us to exercise expenditure responsibility, and we provide grantees with the support to understand what that means. We are also working on ways to incorporate equivalency determination into our grantmaking process so that we can provide even more flexibility in funding and reporting for our international grantees.


I have found that trust is truly valuable in propelling the work and making a more significant impact. If the broader philanthropic sector can also make trust its *modus operandi*, we can welcome a greater diversity of grantees to our community, and with them a greater pool of creativity and approaches to draw from – meaning greater chances to solve the problems that we have been trying so long to overcome. 

Lifting restrictions

By Maya Thornell-Sandifor, Director of Racial Equity Initiatives; Borealis Philanthropy

In the last few years, Borealis Philanthropy has taken on a number of practices in order to make our grantmaking processes more equitable: providing participation stipends for declined organizations, choosing grantees with the support of peer-led advisory groups, and replacing lengthy, often burdensome reports and proposals with interviews and brief surveys, to name a few. Whenever possible, we award general operating grants to allow our partners maximum flexibility in using them. Internally, we consistently interrogate our

grantmaking practices to ensure we are not placing undue burdens on grant partners, that we're being open to feedback, and that we're responding rapidly to urgent needs in the field.

With the advent of COVID-19, many of the funds at Borealis decided to convert their existing project grants into operating grants. As grantmakers, we recognize that it's our grant partners, not us, who are the experts running their organizations. We trust their vision and leadership, and we aim to earn their trust by working in service to them through our grantmaking processes and behaviors. Full equity in grantmaking and programs is a work in progress, but we are committed to reflecting, continually, on how we can better “walk the talk” regarding our values. 



Supporting the engineers of systems change

By Kimberly Canfield, Grants Manager,
The James Irvine Foundation

The singular goal of The James Irvine Foundation is a California where all low-income workers have the power to advance economically. Our grantmaking focuses on achieving individual success for working Californians, strengthening the communities they live in, and changing statewide systems and policies for more long-term, transformative impact.

Supporting organizations engaged in advocacy and policy work is one important way we do that. Another central piece of our approach is understanding that our grantees know best what changes to seek, and how.


What that looks like varies greatly. A few examples:

Our Fair Work initiative supports those that engage low-wage workers in securing their wages, rights, and protections. This includes grantees like the Warehouse Worker Resource Center, which uses education, advocacy, and action to change poor working conditions across the Inland Empire, the largest warehousing hub in the country.

The Better Careers initiative supports organizations connecting low-income Californians to jobs with family-sustaining wages and advancement opportunities. This includes grantees

focused on state policy, like the National Skills Coalition, and on specific constituents and policy changes, such as the Anti-Recidivism Coalition.

Our Priority Communities initiative funds grassroots engagement in economic planning for residents of inland California cities who do not have the same access to public, private, and philanthropic resources as Coastal city residents. This program also funds research on topics like poverty, the housing crisis, workers' rights, workforce training, employment strategies, and the critical role immigrants play in our state, aiming to educate and engage California's policymakers.

Our goals for systems change also mean fostering partnerships with other grantmakers, labor unions, and the public officials and agencies committed to expanding opportunities for low-wage workers. These partnerships take different forms, but all are driven by the reality that we must maximize efforts, bring good ideas to scale, and build strong nonprofits and fields for the greatest possible impact in California. 



Removing barriers, building trust


By Elaine Mui, Grants & Operations Manager; General Service Foundation

At General Service Foundation, values guide our work and our practices. In 2016, we identified “justice” as our north star, and affirmed a set of values based in justice that we have been working to operationalize. Justice frames the ways in which we do our work and build the trust-based relationships that form the heart of our work.

As a grantmaker, we know that we earn trust when we convey that a partner is heard, honor their time, and center their expertise regarding the solutions that their communities need. Trust means valuing grantees’ energy and honoring our shared goals in advancing equality and justice. Importantly, trust also shifts the power dynamics between funders and grantees, and moves us towards a partnership centered on love and respect.

Trust shows up across our foundation, in each of our roles. Grants managers have a vital role in creating and managing systems that can either build trust or build barriers to trust. Here are a few of the ways that we have worked to center trust in our grants process:

- We streamlined our application to center grantees’ experience and honor their time. We start with a statement assuring grantees that we will only ask for information we actually use. We also invite feedback multiple times during the grant process.
- We have set a policy of defaulting to multi-year general operating support as a way to demonstrate our trust in grantees. In addition, we removed the grant terms from general operating support agreements so grantees can use those funds as needed – for instance, putting funds towards reserves so they can plan for unforeseen shortfalls, or towards programs that need immediate resourcing.
- In 2018, we replaced written reports with phone calls, better honoring the time of organizational leaders and creating deeper connections – the kind you can’t get from writing or reading a report. This creates space for grantees to speak openly with us about challenges, and for us to learn how we can better support their needs.
- We don’t require interim calls, but instead create opportunities to connect anytime. Our intention is to invite connections without the constraints.
- Since 2018, we have provided additional support for staff health and wellbeing. These stipends are given without requiring an application. Open and honest conversations help us understand if an organization’s staff or leadership is in need of support.

We encourage our philanthropic colleagues to lean into your values, and support your partners with love and trust. 



Betting big on advocacy

By Wendy Elliott, Grants Manager, Alliance for Early Success

Investing in policy is a powerful lever for scale and permanency.

The need is huge. For example, if all of the nation's major foundations spent the entirety of their grant budgets directly funding early childhood programs and services, those funds would run out in a matter of months. But if foundations invest in winning increased funding from local, state, or federal agencies, that investment is amplified exponentially. And it's usually permanent.

In the past, major foundations and philanthropies focused on children and families have been reluctant to invest in policy advocacy. But facing up to chronic, generation-over-generation poverty, more are looking for high-potential "big bets" – the strategic investments that not only make a difference for families, but also unlock the sustained investment necessary to make big, lasting change.

Every year, the Alliance for Early Success makes investments across the country from a pooled fund created by private investors and foundations. These grants go to highly effective advocacy nonprofits in every state – organizations that know their state, their communities, and the most powerful, viable opportunities to improve early childhood outcomes. Additionally, we've found it effective to invest in channels for these state-level nonprofits to interact with – and learn from – each other.

We also fund a technical assistance network made up of the country's leading experts on early childhood health, education, and family support, equipping these critical voices with the latest research and proven strategies.

Investing in state early childhood policy advocacy has been an immensely powerful strategy for us, one that delivers more resources than we could ever raise or disperse ourselves. [▲](#)

Centering justice in our work

By Kaberi Banerjee Murthy, Director of Program & Strategy, Meyer Memorial Trust

If philanthropy wants to focus on change and not on charity, the sector must show up differently, aligning our actions with our values and trusting that those who are closest to challenges are also closest to the solutions.

At Meyer Memorial Trust, we are in the midst of a Theory of Action process that clarifies our commitment to racial equity as the centerpiece of a flourishing and equitable Oregon for all.


We are interrogating how a racial equity lens can permeate every aspect of our organization's work: grantmaking, investments and operations. We have begun a design thinking process that reimagines the "how" of our work – like implementing reduced grantmaking reporting requirements, accepting non-Meyer applications and reports and adopting electronic payments and grant agreements – to align our practices with our values for the long-term.

We are also thinking about the "so what" of our work, naming race explicitly when we talk about changing our philanthropic focus areas. By deepening our understanding of Oregon's history of racial inequity and how it continues to drive disparate outcomes, we are able to focus more directly on root causes in the "what" of our work.



A mural in NE Portland honoring Ahmaud Arbery, George Floyd, and Breonna Taylor. Artist: Christian Grijalva. Photo credit: Tojo Andrianarivo

In July, Meyer announced Justice Oregon for Black Lives, a \$25 million, five-year initiative to make strategic investments in the lives of Black Oregonians. The largest initiative in our 38-year history taps into our endowment and is an embodiment of Meyer's commitment to justice for all Oregonians, an effort to combat white supremacy and anti-Blackness, pillars that underpin the multiplicity of injustices that exist in our state and our nation. The initiative's strategy will be co-created with Black communities and led by staff with lived experience, and our first slate of grants honored the trusted relationships we have with Black-led and Black-serving organizations in our portfolios.

Part of what made Justice Oregon for Black Lives possible was a journey undertaken by Meyer staff and trustees, which we began more than seven years ago, encompassing dozens of equity trainings, staff retreats, and internal workshops, all which have moved us to embed equity at the heart of our work and our workplace. Centering racial justice has required continuous, evolutionary growth in our grantmaking and core institution systems to address many different levels of injustice. We urge our neighbors in philanthropy and beyond to join us in this imperfect but necessary journey, and welcome partnership along the way. 



Listening, learning, and adapting

By Kerri Hurley, Director of Grants Management, Barr Foundation

During these challenging times, the Barr Foundation has adapted to provide new flexibilities and support to our partners, and to get new resources into our community quickly. With full support of our trustees, Barr made several changes to our processes in response to this moment, and will be reflecting on these changes and considering which make sense to build into how we work longer-term.

Like many of our peers, as we saw the disproportionate impact the pandemic was having on certain communities in our region, we knew we needed to do things differently. Our program staff reached out to grantees to explore what flexibilities might be most helpful: converting program support to operating support, waiving contingencies, accelerating timing of payments and grant approvals, providing no-cost extensions, and relaxing or completely waiving reporting requirements. We've also made changes to our internal processes – like streamlining administrative requirements for program staff submitting grant recommendations. We recognized how important it is for Barr to provide our grantees with flexibility and support, and to provide our own staff with greater flexibility to focus on relationships with grantees, potential grantees, and community partners – as well as to recognize the pressures and uncertainties our own staff were facing.

Early on, Barr contributed to a number of pooled funds providing emergency relief in communities across Massachusetts. And we have made several rounds of grants in direct response to the needs arising from COVID-19. For these, we used an expedited process, and in some cases even accepted proposals and reporting documents grantees had prepared for other funders. (To learn more about Barr's response to COVID-19, visit barrfoundation.org/covid-19.)

As a Foundation, we know we don't have all the answers. While it is still hard to imagine what a post-COVID world will look like, we are committed to continue listening, learning, and adapting, to keep focused on what is most important, to eliminate needlessly burdensome processes, and to demonstrate our enduring commitment place equity at the center of our grantmaking and organizational practices. [▲](#)



Starting with Risk

By Emily Goulding

With the urgency this era demands, we have to ask ourselves: What if we did things differently? What if we took a risk to get a better outcome? And if we aren't willing to do that, what are we really doing?

Amplifier started as a risk – in fact, our organization risked everything on one big project.

Following the divisive U.S. presidential election of 2016, we used our one unrestricted operating grant and funds raised through a subsequent crowdsourcing effort to launch a campaign called We The People. The goal was to flood the 2017 inauguration with new symbols of hope around an American identity rooted in pluralism. We took out three full-page ads in national newspapers, hacking their existing distribution networks in order to reach every corner of the nation, sneaking messages of hope past the barricades in Washington, D.C. (where protest signs were effectively banned for the inauguration). We also distributed tens of thousands of large placards throughout the city, handing them out free at Metro stops, from the back of moving vans, and at drop sites coordinated over social media. Ultimately, more than a million people, in 195 countries,

downloaded “We the People” prints for free from Amplifier’s website, which they then turned into everything from protest signs and murals to t-shirts and dresses, making it the most viral art project in history.

That investment paid off: Today, we are a mid-sized nonprofit design lab that builds art and media experiments to amplify the most important movements of our times. (And sales from We The People artwork continue to support our organization to this day!)

Together with our community of social change partners in both the for-profit and nonprofit worlds, we build symbols and language that change the national narrative. We turn artists into activists, observers into participants, and marchers into voters. Since 2015, we’ve collaborated with 10,000-plus artists around the world and distributed millions of pieces of art. We’ve also sent resources to millions of students across the U.S. through our Education Amplifier program, which offers free artwork, lesson plans, and teaching tools to help facilitate nonpartisan conversations around social justice in the classroom. We’ve built the nation’s largest network of educators committed to

amplifying progressive movements in their classrooms, and just recently launched a national program to teach teens how to make movement art with the award-winning Unshuttered photography program at the J. Paul Getty Museum.

Due to careful fiscal management, we've had the operational capacity to respond to this year's defining events. In March, we launched an emergency COVID-19 campaign with top art curators and public health advisors from around the world. In just five weeks, our global open call competition received over 10,500 submissions from 46 countries, in 21 languages. As a commitment to solidarity, we raised grant funds to provide artists' fees for the winners and reclaim over 10 million dollars in ad space globally. The campaign was featured widely, in *The New York Times* and *National Geographic*, on NBC and NPR, and elsewhere. And this summer, we launched an original art

To shift the culture, it takes a tidal wave: We can't expect to achieve real, lasting change – in our organizations or our society – by making ripples.

campaign for the movement for Black lives in our hometown of Seattle, as part of an ongoing programmatic focus on racial justice. This winter, we are taking a risk again with a new post-inauguration campaign to build strength of spirit among those most vulnerable to the threats at hand.

To shift the culture, it takes a tidal wave: We can't expect to achieve real, lasting change – in our organizations or our society – by making ripples.

To ensure that riskier projects and organizations can take root, flourish, and lead the way forward, we advocate for American philanthropy to take these two steps:

- **Expand the idea of who gets funded.** American philanthropy should invest in BIPOC-led groups, which have been historically undercapitalized and underrepresented in this sector as well as in the halls of power. It should also prioritize people who are both thinkers and doers: those who wield influence over the way families, communities, issues, fields, or sectors operate. Art and cultural organizing bring their own "X factors" to bear to narrative- and culture-shift work, but the fields of business, media, technology, and academia each have unique strengths to offer.

Also, make a point to fund nontraditional projects or organizations, including hybrid organizations that do more than one thing. For instance, we at Amplifier aren't traditional journalists, artists, organizers, or educators. We do all of those things: arts and culture, marketing and communications, media justice, and democracy-building work, crafting stories and campaigns that cross platforms. Through that hybrid approach, we have come to play a central role in the organizing space – but we're only able to do that because someone invested in us in the first place.



- **Expand the idea of what gets funded.** American philanthropy should invest generous amounts of general operating support in the endeavors it funds. It should also look beyond traditional leadership and models, considering the people involved first, and their business model second. Leaders from under-resourced groups – such as people of color and women – might be less committed to the traditional 501c3 model due to lack of access to funding, connections, and legal support, or simply due to their interest in other business structures. More philanthropies should be model-agnostic when it comes to financing.

The real battle for the future of this nation is a narrative one. The story we tell about what we see in the mirror defines who we can become, as a country. After this election, we are going to need to rebuild hope; that involves rebuilding our national spirit but also rebuilding our sector to operate more equitably than it did in the past. And we cannot wait: With the existential threats posed to our democracy, and our very life on this planet, the time to act is now.

Let's do more than innovate: Let's risk it all. Let's think big, and act swiftly. And as we complete each step, let's ask ourselves: Do things look differently than they did before? If so, good.

After all, just what do we have to lose? Everything. ▲



Emily Goulding. Director of Development & Communications, Amplifier

You've heard from our community, now ask yourself: What are you ready to risk to create a future where we can all thrive?

Check and live your values.

- Get explicit about risk
- Understand the power of process
- Lean in with your community

Use your voice.

- Focus on long-term systems and policy change
- Use your influence to change philanthropy

Build trust.

- Offer flexible, unrestricted support
- Be a trustworthy partner
- Do your own homework
- Democratize decision-making power

Fund racial and social justice.

- Center racial equity
- Support BIPOC leaders and communities

Rethink the 95%.

- Increase payout
- Make your investments matter
- Spend down

Quick: Think of a sector that embraces risk, looks unabashedly to innovation and the future, and is ready to fail better and better, over and over. Chances are, your first thought was not philanthropy.

Large fortunes to protect, family legacies to guard, reputations to preserve, peers to impress, impacts to ensure: The list of perceived hazards is long in the sector.

For those in grants management, the idea of risk is also tied to practical matters: following due diligence to a T, assuring legal and procedural compliance, reviewing applications and reports, creating processes and keeping to them.

A silver lining of the current crisis is that our sector has been moved to act with urgency, to lean into organizational values, and to start embracing risk. Unsurprisingly, our members have helped lead the way.

When the pandemic hit, and PEAK needed to cancel our conference, our community rallied. By donating your registration fees or putting them towards new Organization Memberships, and by showing up in record numbers over the months that followed, you've shown your commitment to advancing the state of our community and grantmaking overall.

Amidst multiple crises, you have come together to leverage the power, and potential, of our community. Through our CONNECT forums, Community Conversations, chapter meetings, and virtual coffee breaks, you've shared what's working and what's not, and worked collaboratively to rethink the most effective ways to meet the mission and get funding out the door.

We are moved to see members stepping up courageously – to change the status quo, implement responsive practices, and prioritize trust, equity, and impact over any of the perceived risks. But, like I said, we are not surprised: You were prepared by years of behind-the-scenes conversations and convenings. And the resulting buy-in from leadership makes it clearer than ever that operational changes are what make strategic change possible.

The PEAK community is also working to make racial equity the sector's most urgent imperative. Our organization is dedicated to taking action alongside our members, and in league with the peers and individuals – like CHANGE Philanthropy, ABFE, Edgar Villanueva, Vu Le, and many others – who have been leading racial justice work and conversations for years.

The outcry to do better grows and we're here to say that PEAK has been working for years to ensure that grants management professionals possess the planning, thought, and skills needed for implementation when leadership is ready to engage. To be successful, we must be committed to learning while doing, and staying engaged for the long haul. PEAK is here to help keep everyone moving forward.

We have the momentum. Let's continue putting the work of grants management professionals, our community's collective wisdom, and leadership at every level to incredible use. Let's commit to the long haul. Let's reimagine philanthropy. ▲



Sara Sanders,
Membership Director

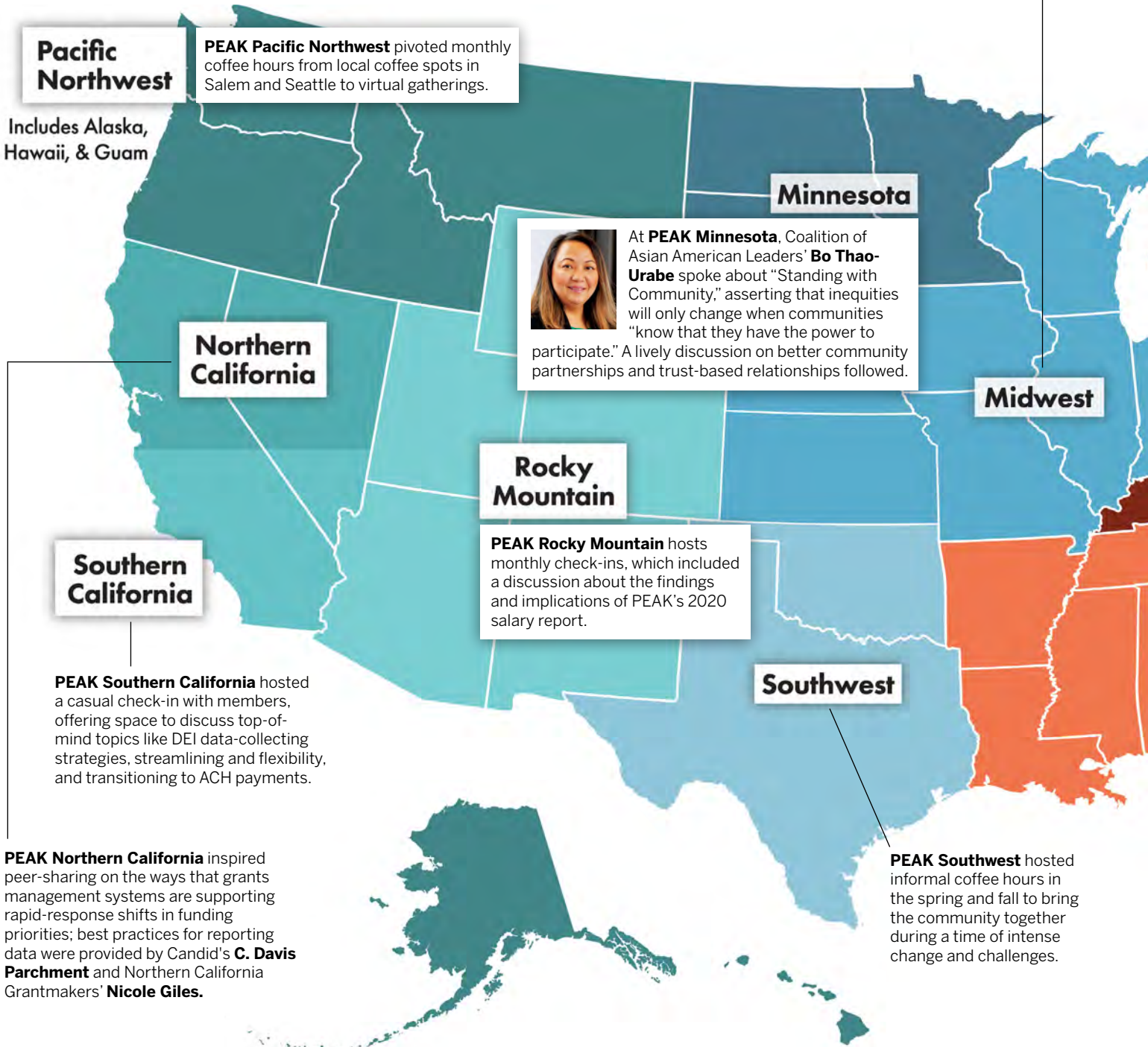
AROUND THE CHAPTERS

All 14 PEAK chapters have hosted a dazzling array of virtual events over the past six months, bringing together members for PEAK2020 Online, for learning and reflection, and for freshly reimagined networking events. We are deeply grateful to PEAK's dedicated corps of volunteer chapter leaders for their energy, creativity, and commitment to re-envisioning member gatherings for our remote-only moment. Below, find a sampling of the dozens of events they've hosted over the past six months. Be sure to explore what's coming up at peakgrantmaking.org/events.

– Altinay Cortes, Chapter Manager



PEAK Midwest hosted the very first PEAK dance party! Members and staff joined to relax and let loose with an energetic Zoom music mix spun by DJ Alexander Great.



PEAK Mideast partnered with Grantmakers of Western Pennsylvania to co-host an interactive session on the evolution of the grants management model, the current state of grantmaking operations, and how to reach the next level of effectiveness.

The peer panel at **PEAK Northeast's** session shared the ways they are streamlining reporting practices and improving the grantee experience.

PEAK New England hosted their first-ever virtual meeting during PEAK2020 Online this spring.

PEAK Delaware Valley hosted "quarantinis" to inspire some informal end-of-day networking.

PEAK Greater Washington, DC hosted a discussion on understanding equity and leading the chapter forward, led by former chapter chair and current PEAK Board Member **Miyesha Perry**, Director of Grants Management at Kenneth Rainin Foundation.

At **PEAK Southeast**, members considered ways to use data to assess the effectiveness of their grantmaking practices.

PEAK Florida and **PEAK Minnesota** co-hosted a session on justice and inclusion in grantmaking practice, facilitated by PEAK's **Melissa Sines**. Members delved into the ways that practices can either support or obstruct equity, and worked through a design thinking exercise on leading change.

Florida
Includes Puerto Rico & US Virgin Islands

2020 Chapter Leadership Summit



In June, volunteer leaders from all 14 chapters gathered for a week-long virtual Summit where they received updates from PEAK staff, participated in a professional development workshop on virtual meeting facilitation, and shared tips, best practices, and plans.

Among the highlights: A keynote on building an equity-focused culture from **Carol Cheney**, Diversity Equity and Inclusion Manager at Meyer Memorial Trust; PEAK Midwest Co-Chair **Tara Havlicek** sharing ways to address the Dimensions of Wellness; PEAK President and CEO **Satonya Fair** sharing her vision for PEAK; and a group brainstorm about how to celebrate PEAK's 25th anniversary in 2021.

A special note of appreciation to Interim Board Co-Chair **Gary Romero** for kicking off the Summit, and to event planning committee members **Shei Sanchez** (PEAK Mideast), **Tara Havlicek** (PEAK Midwest), **Indya Hartley** (PEAK Northeast), and **Jody Marshall** (PEAK Pacific Northwest): We are grateful for your leadership!

PEAK Midwest Co-Chair Deb Debbaut (top) and PEAK Florida Membership Chair Sissi Villamizar sharing during a self-reflective activity.

MEMBER NEWS

PEAK Northeast Communications Co-Chair **Melissa Utsett** has joined Borealis Philanthropy as a Grants Manager, following her departure from the Dyson Foundation.

PEAK SoCal Communications Chair **Jennifer Katell** is now a Grants Manager at The SCAN Foundation, following two years as a Grants Analyst for The California Endowment.



Jen Bokoff, previously of Candid, has taken the Director of Development position for the Disability Rights Fund.

The Grove Foundation has a new Grants Manager in **Blanch Vance**, previously of The Annenberg Foundation.



Ashley Dietz, former Chair of the PEAK Florida chapter, is leaving her role as Senior Director at United Way Suncoast to join Florida Philanthropic Network as their new President and CEO.



After serving as the first Grants Manager at the Temple Hoyne Buell Foundation, PEAK Rocky Mountain Chair **Kelly Costello** is now a Grants Manager for Rose Community Foundation.

The Bill & Melinda Gates Foundation selected program director **Anita Zaidi** to fill their new President of Gender Equality role.

Sissi Villamizar, PEAK Florida Membership Chair and Grants and Project Management Associate at Helios Education Foundation, earned a Post-Crisis Leadership

Certificate from University of South Florida Muma College of Business.



Ursula Stewart has started in a new position as Grantmaking Industry Advisor at Salesforce.org.

PEAK Northeast Co-Chair **Paige Granger** has been promoted to Director, Grants Management at The Rockefeller Foundation.

Grand Victoria Foundation has hired **Dianna Manjarrez** as their new Elgin Program Assistant.

Frank Fernandez has been named the new CEO of the Community Foundation for Greater Atlanta.

Borealis Philanthropy has promoted **Tashie Sloley** (PEAK Northeast Communications Co-Chair) to Director of Grants Management.



PEAK Board Member **Tim Robinson** has been promoted to Vice President of Administration and Partnerships at Lumina Foundation.

The Kresge Foundation has promoted **Genise Singleton** to Director of Grants Management.

Roland Kennedy, Jr. has been promoted to Chief of Staff for Operations, Economic Justice Portfolio at Bloomberg Philanthropies.



Shantelice White was promoted to Director of Grants Management by the Bainum Family Foundation.

PEAK Mideast Chair **Kristen Summers** has been promoted to Senior Grants Manager at Saint Luke's Foundation.

Welcome, new Organization Members!

3M / 3M Foundation

Advancing a Healthier Wisconsin Endowment

Agnes M. Lindsay Trust

AIDS Healthcare Foundation

Alliance for Early Success

Alliance for Justice

Amalgamated Bank

America for Bulgaria Foundation

Andre Agassi Foundation for Education

Animal Assistance Foundation

Arthur M. Blank Family Foundation

Bainbridge Community Foundation

Blowitz-Ridgeway Foundation

Blue Shield of California Foundation

Bohemian Foundation

Cedarmere Foundation

City of Raleigh

Civic Allies Consulting*

Colorado Trust

Community Foundation of Northern Illinois

Council of Michigan Foundations

Dr. Bronner's Family Foundation

ELMA Philanthropies

ESL Charitable Foundation

Evangelical Lutheran Church in America

GlobalGiving

Grantbook*

Greater Milwaukee Foundation

Greater New Orleans Foundation

Group Health Foundation

Hirsch Philanthropy Partners*

Hypertherm HOPE Foundation

InFaith Community Foundation

Internet Society Foundation

James F. and Marion L. Miller Foundation

John and Wauna Harman Foundation

Kalamazoo Community Foundation

Laidlaw Foundation

Laudes Foundation

Lotte & John Hecht Memorial Foundation

Luminate

Margulf Foundation

Maryland Historical Trust

Medica Foundation

Minneapolis Foundation

Mission and Ministry Inc. (Daughters of Charity)

Mortimer & Mimi Levitt Foundation

National Children's Alliance

National Geographic Society

NDN Collective

New Hampshire Children's Health Foundation

New Venture Fund

Open Philanthropy Project

Paul G. Allen Family Foundation

PBS Foundation

Perigee Fund

Phila Engaged Giving*

Posner Foundation of Pittsburgh

Robins Foundation

Rogers Family Foundation

Rotary Charities of Traverse City

S.H. Cowell Foundation

Salesforce

Schott Foundation for Public Education

Seattle Public Utilities

Share Our Strength

Simón Bolívar Foundation

Sisters of Charity Foundation of Cleveland

St. David's Foundation

Stranahan Foundation

Target

Texas Women's Foundation

The Carl Gellert and Celia Berta Gellert Foundation

The Conrad Prebys Foundation

The Fuller Foundation

The Grace S. and W. Linton Nelson Foundation

The Grove Foundation

The Priddy Foundation

The Weld Trust

TransitCenter

Unbound Philanthropy

United Way Worldwide

Victoria Foundation

Vista Hermosa Foundation

Washington Research Foundation

WES Mariam Assefa Fund

Women's Public Leadership Network

World Wildlife Fund - Russell E. Train Education for Nature Program

YouthHope Foundation

Zilber Family Foundation

*Consultant Members

PEAK Programs

Here, you'll find a roundup of what's new and notable around **PEAK Grantmaking**, and ways you can tap into a growing array of member-exclusive resources, insights, and events to support your work – from the latest reports and “how-to” tools to interactive online courses and upcoming virtual events, our **CONNECT** peer-learning communities, and more.

LATEST RESOURCES

Lead the way in putting principles into practice

Created by and for our members, the **Principles for Peak Grantmaking** are a values-driven, equity-centered, practice-based roadmap for change. In 2019, we issued a call to transform the practice of philanthropy into the practice of principled grantmaking, as introduced in our white paper *Courage in Practice*, complete with a collective vision and action plan. In 2020 and 2021, we'll be using the five Principles as a framework for educational content that equips you to inspire and lead equitable change in your practices.

Explore our latest release: **Drive Equity**.

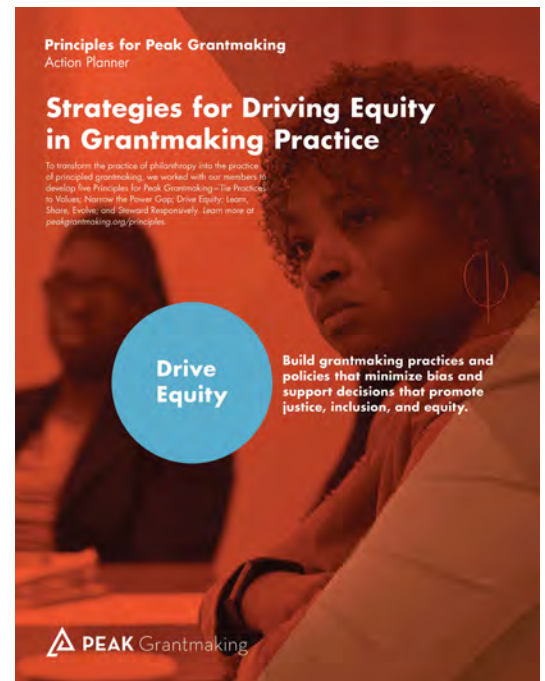
In the face of the pandemic and resurgent movement for racial justice, philanthropy has made commitments to change its story: to be a better partner for leaders and communities of color, and to implement more equitable grantmaking practices. In July, we released a robust set of resources around our third Principle, *Drive Equity*, designed to help your organization live up to those commitments.

Building upon and paired with resources for our first two Principles, *Tie Practices to Values* and *Narrow the Power Gap*, grantmakers now have an expansive collection of powerful tools to deploy in the service of justice, inclusion, and equity.

Including case stories, in-depth “how-to” guides, and our new and evolving Principles Communities of Practice, we've produced a comprehensive toolkit for Organization Members. All members can access case stories, along with resources like action planners, webinars, and insight roundups from the field.

Find them all at peakgrantmaking.org/principles.

Coming in 2021: We'll release resources, tools, and webinars to advance your work in the last two PEAK Principles: *Steward Responsively* and *Learn, Share, Evolve*.



Drive Equity Resource Roundup

Exclusive to Organization Members

How-To Guides

Uncovering Unconscious Bias in Philanthropy

How to Reduce Bias in Grantmaking Strategy, Community Outreach, and Applications

How to Reduce Bias in Decision-Making and Grant Awards

How to Recruit and Onboard Diverse and Inclusive Grant Committees

How to Facilitate Inclusive Meetings

How to Get Started with Demographic Data

Available to all members

Case Stories

A Decade of Building Toward Racial Equity at Woods Fund Chicago

How Brooklyn Community Foundation Centers Community Voices in Grantmaking Strategy

Open to the community

Action Planner

Strategies for Driving Equity in Grantmaking

On-Demand Webinar

Drive Equity: Promoting Justice and Inclusion in the Grantmaking Process

Online Course: Smart Risk Management for Greater Impact

Expand your knowledge around risk as you implement more flexible and streamlined grantmaking practices. This online course, created with input from our members and resources from PEAK and Open Road Alliance, features self-paced, interactive learning; real-world scenarios to provide context; and takeaway resources to support your continuing work, all focused on helping you better understand and manage risk throughout the grantmaking lifecycle.

Complimentary for Organization Members and available to others for a fee. Get started at peakgrantmaking.org/smartrisk.

Join our Communities of Practice

Join peers dedicated to building practical tools, resources, and knowledge for grants managers working to achieve values-driven, equity-centered grantmaking practices. In addition to CONNECT forums, these communities provide members with structured learning and sharing opportunities – including webinars, live discussions, resource libraries, and expert Q&A sessions – around some of the most challenging and leading-edge topics in grantmaking practice.

To join an existing community or suggest ideas for new Principles-focused communities, contact the team at principles@peakgrantmaking.org.

Virtual Learning Series: Philanthropy, Tech & Equity

This fall, and then on-demand, join PEAK, Technology Association of Grantmakers, GrantAdvisor, and Grantbook for a fresh new series on tech in philanthropy. Traditional grantmaking practices are being up-ended in light of a global pandemic and renewed energy around racial, social, and economic justice. So what's taking tech so long to catch up? This four-part series will satisfy accidental techies, data nerds, and tech futurists alike with a journey of learning around philanthropy, technology, and equity. Follow us as we explore, step by step, some of the key components of building a movement.

Learn more at peakgrantmaking.org/2020techseries.

2020 Grants Management Salary Report

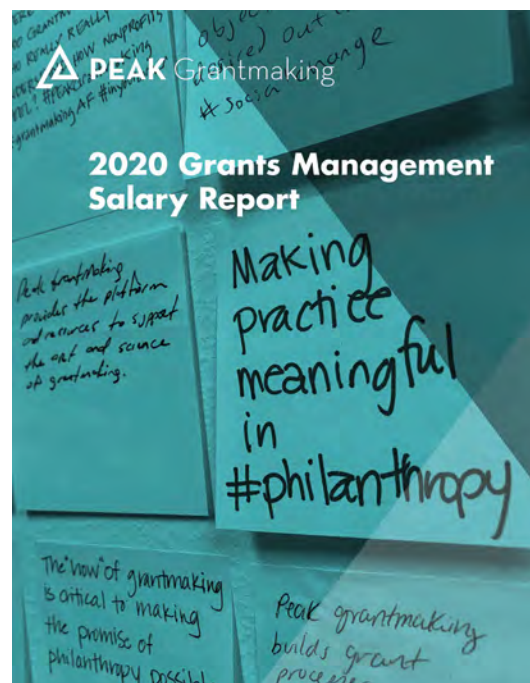
Since we produced our last salary report in 2016, the profession of grants management has been evolving rapidly – with the “how” of grantmaking increasingly recognized as central to organizational strategy. Explore our key findings along with salaries broken down by gender and race, grantmaker asset and type, region, job band, years in the profession, education, race, gender, sexual orientation, and ability or disability.

Download the report at peakgrantmaking.org/2020salaryreport.

2020 Consumer's Guide to Grants Management Systems

Developed by Tech Impact's Idealware, in partnership with PEAK and Grantbook, the 2020 Consumer's Guide reviews 14 of the most widely used grants management systems against hundreds of requirements criteria developed with the expertise of consultants, vendors, foundation program officers, and system administrators.

Download the guide at peakgrantmaking.org/2020gmsguide.



WHAT'S NEW ONLINE

PEAK resources and insights are now just a click (or two) away

We've spent 2020 building out more streamlined and intuitive ways for members to search and access all that PEAK has to offer. Our expanded Resources section collects all of our action planners, how-to guides, reports, and – this fall – on-demand webinars in one place so you can quickly find what you need.

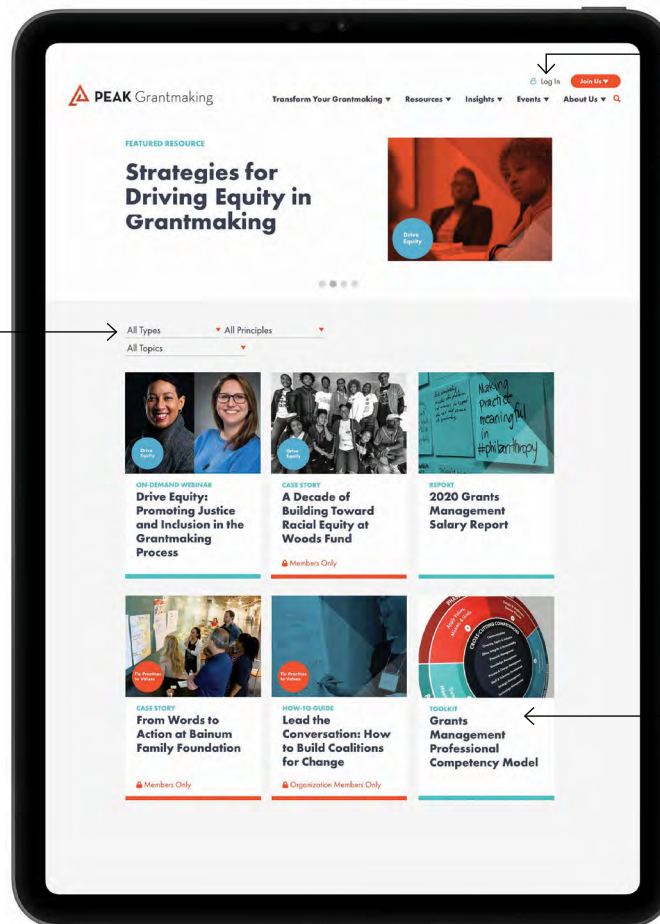
Find them all at peakgrantmaking.org/resources.

Our new job board

Explore the latest career opportunities posted by our community. Is your organization searching for a new team member? PEAK members are invited to add job postings at no cost. Simply log in, complete our brief form, choose the length of posting, and you're in!

Visit peakgrantmaking.org/job-board.

1. Search our resource collection by topic and Principle to find what you need.



2. Log in to access all our member-exclusive resources and insights, and to register for events.

3. Click to download documents and watch on-demand webinars.

CONNECT WITH PEERS

PEAK's member-exclusive online community, CONNECT, is your place to share ideas, discuss issues, offer advice, and network with other grants management professionals.

A daily digest will keep you in the know, and you can easily search past contributions to find what you need when you

need it. In addition to the all-member open forum, sign up for chapter forums and interest-based communities centered around areas like corporate grantmaking, small foundations, career development, and, coming soon, grants management systems and technology-related topics.

Questions? Reach out to the team at connect@peakgrantmaking.org.

1666 K Street, Suite 440
Washington, D.C. 20006

SAVE THE DATES



PEAK 2021
Online | May 2021



PEAK 2022
New Orleans | March 21-23, 2022