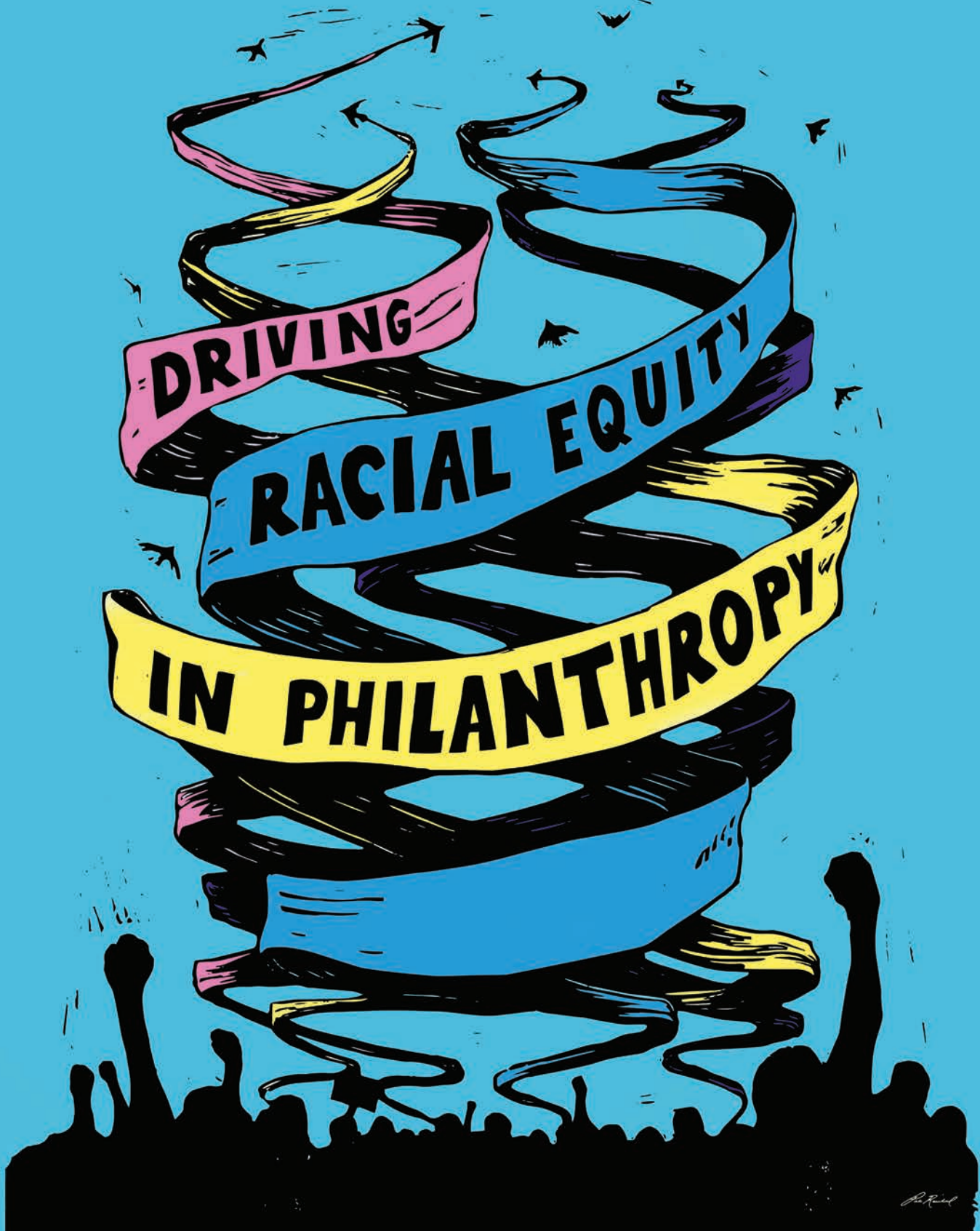


PEAK   
GRANTMAKING

# Journal

Winter 2022, Issue 19



# The PEAK community has made one priority clear: **Equity** must be at the heart of our work.

We started 2021 on a journey to commemorate our 25th anniversary—a time to celebrate, reflect, and launch into PEAK's next chapter. It was also a year where our work was deeply rooted in the Drive Equity Principle for Peak Grantmaking. As we gathered to talk about career development, advancing practice change, or imagining the philanthropic technology of the future, we always recentered on the urgent need to realize racial equity and racial justice.

That's why this edition of the *Journal* is dedicated to driving racial equity in philanthropy, and why we, alongside our guest editors, Robert Wood Johnson Foundation Director of Grants Management **Adam Liebling** and Kenneth Rainin Foundation Director of Grants Management **Miyesha Perry**, are humbled and proud to share it with you. We also offer deep appreciation to our contributors for sharing their wisdom and experiences.

In these stories from the field, you will be inspired to intentionally build cultures of belonging for all, and, from no matter where you sit, embrace your power to move us closer toward equity and justice in our work and our world.

During the roundtable conversation that is the cornerstone of this issue, we asked what resources we can rely on in the long-term endeavor to dismantle structural racism in philanthropy and rebuild an equity- and justice-focused grantmaking practice. Andrew Brown of the Meyer Foundation said it best: "We have each other."

## **Betsy Reid**

Communications and Marketing Director

## **Sara Sanders**

Membership Director



## **Pete Railand, *Driving Racial Equity in Philanthropy***

Our cover illustration is by artist-activist Pete Railand, a member of Justseeds Artists' Collaborative, a network of 41 artists committed to social, environmental, and political engagement. It was inspired by the surge of Black Lives Matter protests in 2020. "If we want change," Railand says, "it is necessary that we show up." Throughout this issue, we feature the work of nonprofits and artists exploring the themes of racial equity and racial justice and provide insights about their projects and creative processes.

*Justseeds Artists' Collaborative* ([justseeds.org](http://justseeds.org))

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# I know what it feels like to be the “only” in a room.



I've had a career in which I was, continuously, an “only”—female, Black, from Ohio—including, for a time, serving as the only Black person on PEAK's board of directors. But by prioritizing diversity, our board has come to reflect the racial and ethnic array of our community. It has been beautiful to share the richness of experiences and backgrounds represented there today.

Sadly, however, we must face the fact that racial and ethnic diversity do not automatically equate to more equitable treatment or practices.

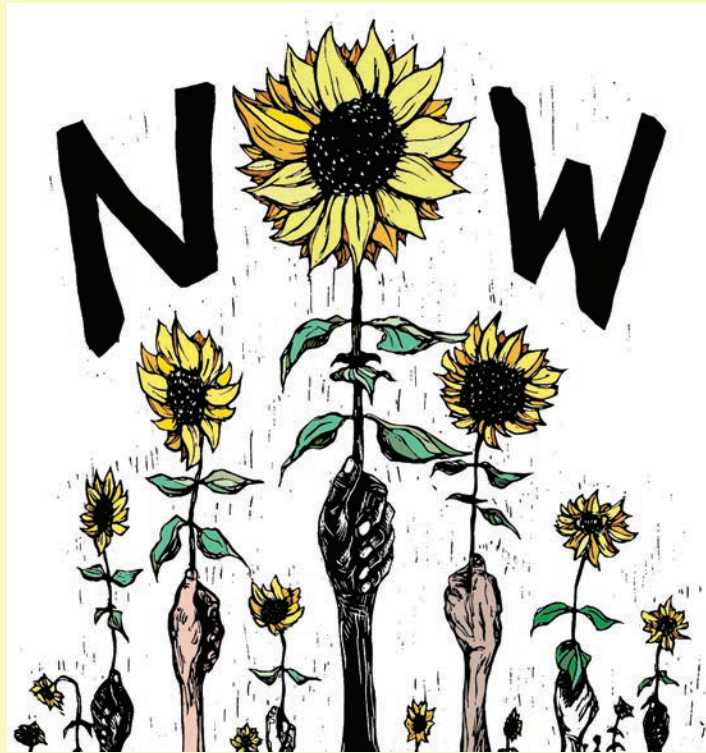
As a Black woman becoming a CEO, my role has changed dramatically, but not so much perceptions about my race, my worthiness, or my perceived authority. As a nonprofit CEO immersed in the philanthropic sector, the perception is that we should be happy with what is given to us, that we should make few demands—the same expectations that are drummed into the psyche of so many nonprofit workers and so many young Black girls. *Say thank you. Don't call attention to yourself. Keep your eyes down and don't act like an equal.*

Hence, I find myself reeling at the intersection of narratives I strongly reject. To live in my power and purpose at this moment, I find myself facing obstacles I likely could have anticipated, but which still take me by surprise. One of those is helping leaders of color understand that the journey toward understanding and achieving racial equity is

not only for white people. It's for us, too because we've been through so much to get here, there's some painful unlearning to do as part of our path.

As people leading the nonprofit and philanthropic sectors become more diverse, I am hopeful that we'll create a new model of leadership that rejects the almost imperceptible pull toward paternalistic, white-dominant, authoritarian models. As I go through my own journey of racial healing, I am both humbled by and proud of the person I have become, living my values with courage and practice, learning while leading, and celebrating the setbacks that can feel like failures, but which are really lessons for the future.

When you think back on PEAK's origin story, I hope you see that equity was baked in from the start. We began by demanding recognition for the complexity of the work we do. We asked for professional development and proper compensation. We rejected being referred to as “back office,” given the connotation that we were hidden, quiet, and less important. We highlighted the strategic oversight of not including grants managers and other operations staff at the decision-making table. We pulled the data that showed the misalignment between the way our organizations made grants and our stated intentions. We made it clear to all that failure was a part of learning—that we need to tell the story of what worked and what didn't with full transparency so that others might shortcut their way toward greater success.



### **Pete Railand, Now**

The idea that hope is a catalyst for action infuses Railand's work featured in this issue. "Through my work, I hope to communicate to the viewer that our lives are unwritten. We can change things," Railand says. "We can work together to make things better." *Now*, which he created for the Global Climate Strike marches of 2019, features the sunflower, a symbol used in social and environmental movements for decades, from the first Earth Day in 1970 to the 2014 Sunflower Student Movement in Taiwan.

*Justseeds Artists' Collaborative*  
([justseeds.org](http://justseeds.org))

Fast forward 25 years to today, and you'll see that those learnings have become the foundation of our Principles for Peak Grantmaking. We didn't pen a quick-fix advice column for foundations. We used all the lessons we've learned, the storytelling skills we've developed, and dedicated, critical inquiry as a glide path toward more equitable grantmaking practices. Advancing equity is a learning journey we need to walk collectively. We need common language and shared understanding if we're going to succeed in transforming philanthropy and the sector writ large.

So what does racial equity have to do with PEAK's mission? Funny you should ask. The answer is *everything*.

I see PEAK playing a critical supporting role in elevating all things that drive equity, even (or especially) when it makes some uncomfortable. As Glenn Harris, president of Race Forward and publisher of *Colorlines*, warns: "An unbalanced system makes all of us pay."

Speaking candidly, I myself am feeling the costs. Amid ongoing social and racial unrest, exacerbated by a pandemic whose end still seems distant, the days can feel heavy. What keeps me living with joy? Seeing how we have transitioned from talking about equity at a conference to advancing equity as the throughline of our work.

In celebrating our 25th year of service, we've committed to the idea that you can throw a party or you can do something!

**"What keeps me living with joy? Seeing how we have transitioned from talking about equity at a conference to advancing equity as the throughline of our work."**

Milestones are the perfect opportunity to call your peeps into action, so that's what we're doing. Let's launch our next chapter by shining a spotlight on racial equity with the understanding that—together—we can dismantle institutional and systemic racism on the path toward better practices. We won't stop until all of us—PEAK staff and board included—are tying practices to values, narrowing the power gaps that exist between nonprofits and funders, and driving equity in every aspect of our work.

As a community, we have all that we need to change this sector for the better. We may have a ways to go, but we are travelling in very good company.

**Satonya Fair**  
President and CEO

# Philanthropy's Long Road Toward Racial Equity

By Adam Liebling, Co-guest editor

**Generosity is as old as humanity. In the modern era, giving became professionalized, scientific, and focused on the underlying root causes of societal concerns, and with that, institutions came to control the largesse and create systems that restrict how money is disbursed. Activists and movement leaders have long fought for changes, but it has only been in the recent past that the field of philanthropy began to acknowledge its flaws and sought to rectify them. Here, our intention is to highlight both obstacles and progress by offering a sampling of some of the historical developments, milestones, and pioneers in the journey. As these examples show, contemporary movement builders have been creating a road map for the change we need to see. Now philanthropy just needs to follow it.**



Early  
1900s

The first major foundations are established in the United States by the nation's captains of industry. They are set up like corporations with boards and professional staff, but with endowments so that they can operate in perpetuity. In many cases, founders' descendents—mostly white men—assert their control over the wealth for generations.

1867



George Peabody, the first major American philanthropist, establishes the **Peabody Education Fund** with a gift of \$1 million. Peabody's intention is to help all poor children in the

South receive an education after the Civil War. But the fund's board restricts grants to existing schools. Because there were few existing schools for Black children in the South, only a fraction of grant money goes to Black students.

5th  
Century  
BC



The earliest recorded use of the word **philanthropy**, which is derived from the ancient Greek for "love of humankind," is used in the play *Prometheus Bound* by Aeschylus. The playwright is known as the father of tragedy, although not because of the tragic way philanthropy is administered over the next 2,500 years.



1889

Andrew Carnegie's influential essay, "Wealth" (later known as, "**The Gospel of Wealth**") is first published in the *North American Review*. This visionary, foundational document calls on fellow millionaires to distribute their wealth for public good during their lifetimes, going so far to say, "The man who dies thus rich dies disgraced." It also conflates wealth with wisdom, setting the stage for institutional philanthropy to judge the worthiness of those in need, admonishing that "one of the serious obstacles to the improvement of our race is indiscriminate charity." Indeed, the rich know best in "administering it for the community far better than it could or would have done for itself."

1969

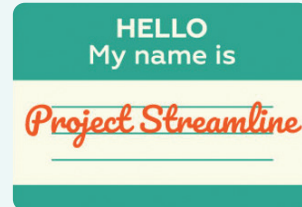
The **Tax Reform Act of 1969** distinguishes between public charities and private foundations and creates the 5 percent minimum payout requirement for a private foundation to maintain its tax-exempt status. Foundations create due diligence processes to comply with the law, including complex application and reporting structures that create barriers for grantees. It also incentivizes the use of private foundations as tax shields to withhold their wealth rather than distribute wealth equitably.

1971



The **Association of Black Foundation Executives** is founded. The oldest funder affinity group in the country, it is formed when Black foundation executives raise their voices to protest the lack of representation in philanthropy. Now known as ABFE, this organization makes some of the first diversity gains in the sector and continues to mobilize grantmaking entities, donors, and nonprofits to improve outcomes for Black communities and the country as a whole.

2007



The Grants Managers Network (now PEAK Grantmaking) launches **Project Streamline**, one of the first reports to interrogate long-standing foundation practices. It identifies ten critical flaws in the administration of philanthropy, including lack of trust. It also provides a comprehensive set of actions that empower grants management professionals to center nonprofits and communities in the grantmaking process. Project Streamline argues that those who are doing the frontline work with fewer resources than funders should not be “drowning in paperwork, distracted from purpose.”

**AAPIP**

**HISPANICS IN PHILANTHROPY**

**NATIVE AMERICANS IN PHILANTHROPY**

1980s

Three pivotal organizations form during this decade and raise awareness that philanthropy exists in all cultures and that their perspectives are grossly excluded and underrepresented in the field: **Asian American Practitioners in Philanthropy (AAPIP)**, **Hispanics in Philanthropy (HIP)**, and **Native Americans in Philanthropy (NAP)**.

2003



**Philanthropic Initiative for Racial Equity (PRE)** is founded, led by a board of racial justice practitioners to “increase the amount and effectiveness of resources aimed at combating institutional and structural racism.” One of its key early publications, created in partnership with GrantCraft, is *Grantmaking with a Racial Equity Lens* (2007), which urges grantmakers to fund solutions that explicitly address racial disparities. In 2019, PRE produces *Grantmaking with a Racial Justice Lens*, which emphasizes power and transformation.

2010



**D5** is formed as a five-year coalition of 18 philanthropy-supporting organizations to help philanthropy become more diverse, equitable, and inclusive. Through research, reports, and tools, D5 identifies three action items to advance equitable practices in philanthropy: tracking and sharing demographic data, diversifying sector talent, and increased listening and collaboration with nonprofits and communities.

*Image credits (from left): Aeschylus, Science Source; James’s Plantation School, North Carolina Collection, University of North Carolina at Chapel Hill Library; Andrew Carnegie, photograph by Theodore C. Marceau, Library of Congress; Federal Reserve Board Governor’s Meeting, Harris & Ewing photograph collection, Library of Congress*

# Philanthropy's Long Road Toward Racial Equity

(continued)



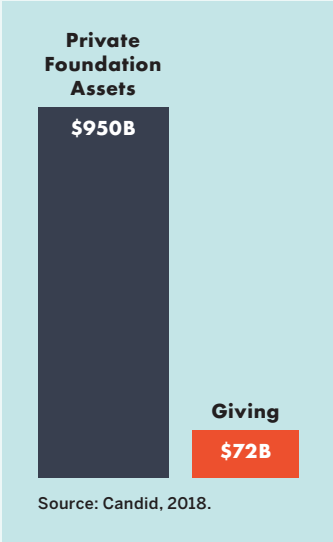
2014

The Whitman Institute frames its long-standing practices as trust-based philanthropy. The philosophy at its core is simple yet revolutionary: Grants are relationships, not transactions, and good relationships are built on trust. In 2018, Whitman joins the Robert Sterling Clark Foundation and Headwaters Foundation to found the **Trust-Based Philanthropy Project**. Participatory grantmaking also begins to gain traction around this time, driven by the disability rights field who proclaim “nothing about us without us.”

2015



**Borealis Philanthropy** is founded as a social justice philanthropic intermediary working to resource grassroots movements for transformative change. Their work is “rooted in the understanding that in order to upend oppressive systems, we must support the people most impacted by those systems.”



2018

Per the latest Candid data, private foundation assets approach \$1 trillion—more than doubling since 2000—with \$72 billion in giving.



2015

**Equity in the Center** emerges as a collaborative of Annie E. Casey Foundation grantees to grapple with the question of why there are so few leaders of color in the social sector. Their answer and call to action is to address racism at every level on which it operates within organizations, which they articulate in the publication *Awake to Woke to Work: Building a Race Equity Culture*.

2016



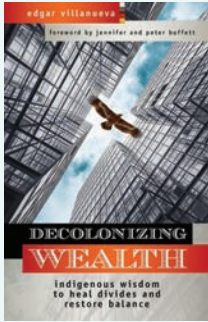
Justice Funders develops **Just Transition in Philanthropy**, a road map for how funders can shift from extractive and exploitative practices toward regenerative and restorative practices by recentering how wealth is accumulated, controlled, and distributed.

2016



**CHANGE Philanthropy**, originally formed in 1993 as Joint Affinity Groups (JAG), unifies identity-based philanthropic affinity groups into an empowered coalition working to integrate diversity, inclusion, and social justice into philanthropic practice and transform the sector's culture to be one that embraces equity. The founding organizations include ABFE, AAPIP, Funders for LGBTQ Issues, HIP, NAP, and Women's Funding Network. The network expands between 2014 and 2019 to include Emerging Practitioners in Philanthropy, National Committee for Responsive Philanthropy, Neighborhood Funders Group, and the Philanthropic Initiative for Racial Equity.

2018



**Decolonizing Wealth by Edgar Villanueva** calls out how white supremacy, savior complexes, and colonialist attitudes underpin philanthropy. He notes how philanthropy is complicit in and contributes to the harm and trauma of communities it aims to support. Villanueva offers a way forward by applying Indigenous wisdom to promote truth, reconciliation, and healing to help stop, prevent, and repair this harm. As he incisively tweeted, “Reparations are a direct way to use money as medicine to heal injustices and return stolen wealth to communities.”



**US Stock Market Index  
April 2020–  
December 2021**

2020

The COVID-19 pandemic and the protests against police brutality and murder of Black people magnify and highlight racial inequities for philanthropy. Yet, according to **a joint survey by PEAK and Exponent Philanthropy**, racial equity continues to not be a core focus in philanthropy, finding that only 18 percent of respondents reported including equity as a primary driver for grant decision-making.

Today

Since April 2020, **the stock market and foundation endowments soar**. According to *Philanthropy and COVID-19: Measuring One Year of Giving*, a report from Candid and the Center for Disaster Philanthropy, only 13 percent of those dollars are directed to communities of color, excluding high net-worth donors like MacKenzie Scott.

2019



PEAK Grantmaking releases **Courage in Practice: 5 Principles for Peak Grantmaking**, calling on funders to align their practices to their values with a focus on driving equity and narrowing the power gap between grantmakers and nonprofits. This call to action places grants management professionals as the agents within their organizations to drive these changes.

**This is a time of unprecedented threats to human and civil rights that has compelled our country to have a social and racial justice reckoning. It is also a time of record-breaking wealth creation for the wealthiest.**

**Philanthropy can shatter long-held institutional norms that center on wealth preservation and at last fully embrace the spirit of generosity for which it was intended. But will it meet the moment?**

The relationships between philanthropy, racism, and resistance are far more complex than space here will allow. For an in-depth look at the developments within the field in recent history, download *PRE's Timeline of Race, Racism, Resistance and Philanthropy 1992–2014* at [bit.ly/PREtimeline](http://bit.ly/PREtimeline).



**Ken Daley, *DiverCity***

"I'm an artist and award-winning children's book illustrator who loves to create art that reflects the Black life in all its iterations," Daley told PEAK in an email. "I painted *DiverCity* to depict the connectedness we have within the human family, but at the same time we all bring something unique to the human experience. Diversity is something our society and institutions need to embrace, protect, and celebrate to create a more just and inclusive world for everyone."

*Ken Daley (kendaleyart.com)*

# How We Can Advance Support for Racial Equity and Racial Justice Funding

By Lori Villarosa

Grants management professionals are strategically positioned to influence a funder's racial equity and racial justice funding. But in three decades of working in and with foundations, I have consistently seen a pattern where people serving in these roles are excluded from these conversations as a matter of institutional habit. As a result, there is a lack of understanding across the field about how the work of grants management directly relates to advancing racial equity and justice. Even when they are included, the scope of their influence can oftentimes be limited to paperwork, reporting, and only the most technical aspects of the grantmaking process. And yet, they also have the ability to shift what is and isn't funded, understand what funder pushback might arise, and how grants are understood and reported.

But before I get into how grants managers can impact racial equity and racial justice grantmaking, it's important to first define these frequently conflated terms and then examine the current racial equity and racial justice landscape.

## Racial equity and racial justice defined

Long-standing tensions driven by unequal power dynamics have shaped debates over how racial equity and racial justice are defined and who does the defining, and there has often been little shared understanding of these terms across the philanthropic field. In our work with foundations and movement leaders, we at the Philanthropic Initiative for Racial Equity (PRE) have seen these tension points manifested within hundreds of foundations. But through our work, we also have the benefit of lessons from movement leaders and change agents, and these have inspired some recommendations that we think will help grants management professionals strengthen their own roles in advancing racial justice work.

Over the past three years, organizers for racial justice and racial equity have called for more precise definitions of those terms, in part reacting to the conflation of equity with diversity and inclusion work. That conflation has muddied the distinction between aiming for change within existing systems and aiming to transform those systems as a whole.

Funding with a racial equity lens has four key features:

- Analyzes data and information about race and ethnicity
- Understands disparities and the reasons they exist
- Looks at structural, root causes of problems
- Names race explicitly when talking about problems and solutions

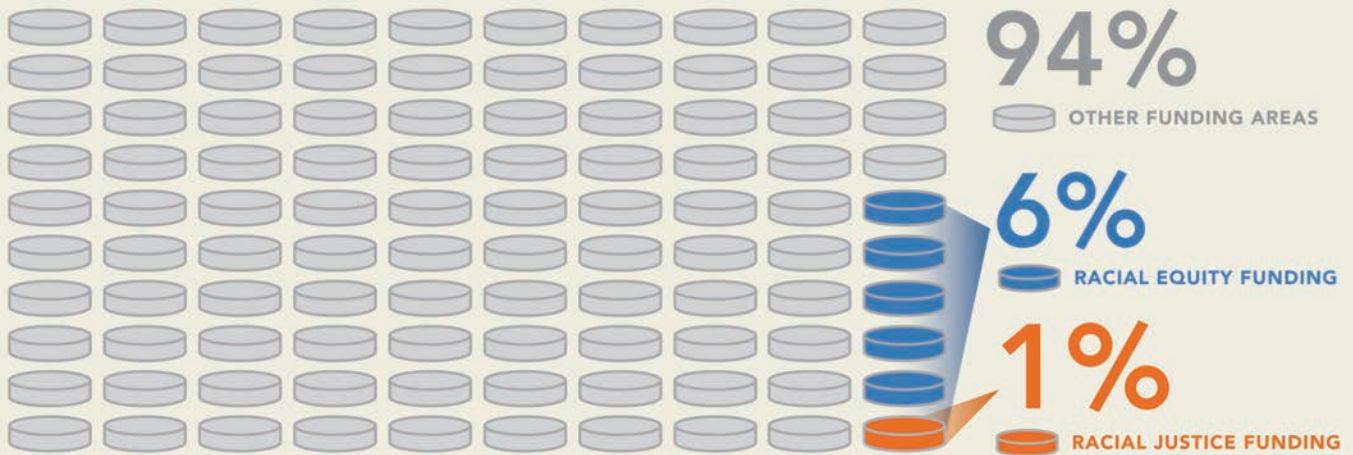
Racial equity focuses on the prevention of harm and the redistribution of benefits within existing systems. Racial equity projects don't usually attempt to fundamentally transform the systems that generate suffering, but they do address the unfair distribution of pain. Ensuring that as many people of color as possible have collective access to the systems that produce education, employment, housing, and a clean environment is vital.

Racial justice funding encompasses the above features, but adds four more critical elements:

- Understands and acknowledges racial history
- Creates a shared, affirmative vision of a fair and inclusive society
- Focuses explicitly on building civic, cultural, economic, and political power by those most impacted
- Emphasizes transformative solutions that impact multiple systems

Racial justice adds dimensions of power building and setting transformative goals, and explicitly seeks to generate enough power among disenfranchised people to change the fundamental rules of society. Power building includes recruitment, leadership development, people-oriented and people-guided education, alliance building, strategic communications, and the deployment of a variety of pressure tactics, from protests to lawsuits. To change the fundamental rules means that a core dynamic of the system is fixed, added, or removed, shifting the balance of power between the community and key institutions such as government and business. Power building can even include providing social services or support for the arts—two sectors traditionally separated from civic power in philanthropy—if they are clearly and effectively attached to racial justice goals and strategies.

## PERCENTAGE OF ALL GRANTMAKING DEVOTED TO RACIAL EQUITY AND RACIAL JUSTICE, 2018



Source: *Mismatched: Philanthropy's Response to the Call for Racial Justice*

These distinctions are not intended to imply a rigid dichotomy where organizations take one or the other approach. In a resilient ecosystem, leaders operating in a web of self-determining organizations can (and often do) sequence and connect racial equity and racial justice efforts. For example, health equity strategies can distribute vaccine access more fairly (equity) while organizers also campaign for universal health care (justice). A group can raise money to pay bail to reduce harm (equity) while pressing legislators to outlaw the cash bail system (justice). People can advocate for the denial of permits for polluting industries in communities of color (equity) to build a base for future campaigns that replace polluting industries with sustainable ones (justice).

**“In the absence of power building, racial equity efforts will always have to negotiate within the limitations of current systems.”**

The closer to the ground one gets, the more likely that many groups will be doing both equity and justice work through varied activities and programs. Sometimes, this ecosystem is literally saving people's lives so they can fight another day.

But here is a crucial point: In the absence of power building, racial equity efforts will always have to negotiate within the limitations of current systems. PRE's latest report, *Mismatched: Philanthropy's Response to the Call for Racial Justice*, presents the most comprehensive assessment of racial equity and racial justice funding to date and is unique in that it clearly categorizes and examines funding across these two categories. In a detailed analysis of grantmaking from 2015–2018 and preliminary analysis of funding in 2020, we

found that investment in racial justice is consistently a much smaller portion of philanthropic dollars compared to funding for the much broader concept of racial equity. In 2018, the last year for which fully complete grants data were available, only 6 percent of philanthropic dollars supported racial equity work and only 1 percent supported racial justice work.

## Dynamics that can hinder or ease racial justice grantmaking

PRE and our many peers advancing racial justice work have long conveyed the critical importance of leaders who understand the issues by virtue of their close proximity to the challenges. This requisite level of proximity can only be achieved through long-term, authentic, and trust-based relationships. Unfortunately, the need to foster these types of relationships are undermined by our implicit biases and the inequitable ways in which our culture frames certain social narratives. It's these dynamics that give implicit permission to funders to put up barriers and create distance between themselves and grant partners—all under the guise that they are being objective in their decision-making processes. Grants management professionals can leverage their positions to challenge these structures, and they can also mediate between funders and current and potential grant partners, and identify and implement practices that narrow the power gap between funders and grantees.

With that in mind, here are three ways in which grants management professionals can reimagine the core functions of their roles to better support racial justice funding.

## 1. Identify the *why* in data management

One of the key takeaways from the research that formed the basis for *Mismatched* is that philanthropy must require and produce precise data, starting with clear and standard definitions of categories. Without this new standard for data, funders lack the information needed to direct the greater share of support to those doing racial justice work closest to the ground.

### **“Grants management professionals collect a huge cache of information, but do they use it in a way that increases funder accountability and transparency in decision-making?”**

Grants management professionals collect a huge cache of information, but do they use it in a way that increases funder accountability and transparency in decision-making? And are they committed to acting as change agents for racial justice, collecting the quality and volume of data that could better reveal patterns of racial and ethnic disparities? Are they asking grant applicants doing racial justice work what they need to grow their movements and their impact?

Be intentional about funding racial justice work and reach out to organizations engaged in it. Seek grantee recommendations outside of your usual circles. Support collaborative projects as well as individual grantees. And remove barriers to effective funding that are particularly onerous for grassroots community groups.

## 2. Ease the burden on grant applicants

A racial justice lens sees time as a key resource and seeks to provide as much of that resource as possible to grantees, rather than extract it through excessive scrutiny or lack of preparation. Typically, a foundation has more flexibility to shift practice than a grantee will have to shift workloads to manage fundraising.

Mounds of research confirm best practices that support grantee stability and growth as well as constructive, trusting relationships between grantees and funders. General support, multiyear funding, a streamlined process, and reasonable reporting requirements are good for all groups. But organizations of color and those tackling racial justice can be particularly harmed by the lack of these best practices because they are often deeply and disproportionately under-resourced. In choosing their own practices, foundations should accept an appropriate portion of the burden for the work required to make a grant.

This includes

- offering application support (e.g., a webinar that explains how the application process works) and adequate preparation time;
- exploring the option to adopt a common application with similar foundations, limiting questions to those required for grant decisions, and being open to having a conversation with grant partners in place of a written proposal or report;
- in project grants, providing at least 25 percent for infrastructure instead of the typical 10–15 percent;
- limiting site visits and, when they are necessary, cover costs for staff, lunch, and other common courtesies; and
- eliminating convenings or collaboration as conditions for funding.

## 3. Reexamine the concept of risk

One of the key ways grants managers can impact racial justice grantmaking is in relationship to assessment of risk and compliance. I have seen so many foundations whose language around prohibition of advocacy is so much stronger than it needs to be by IRS rules and instead often ties to overly cautious frames by senior leaders or those within the compliance area, such as legal counsel. But the overreaction to perceived risks can deter program staff and grant applicants alike from advancing or explicitly naming efforts that are fundamentally about building power and impacting systems in ways that are critical to real racial justice work. Even more problematically when Black-, Latinx-, Asian American and Pacific Islander-, and Indigenous-led organizations that are historically underfunded are deterred from seeking support for the power-building advocacy efforts that are so needed for racial justice work and are perfectly legal yet explicitly or implicitly discouraged by harsh legalese of grant applications or grant acceptance letters.

But what if the conversation within a foundation shifted and instead focused on the risk of not supporting the most effective justice efforts because of this unwillingness to invest in advocacy? And by extension, what are dangers of perpetuating inequities within the nonprofit structure, of potentially supporting strategies that are too disconnected from community-identified and preferred solutions?

**Everyone in philanthropy can potentially play a role in supporting transformative racial justice work. But to unlock that potential, each person needs to apply racial equity and racial justice lenses to all aspects of their work. And grants professionals can be a driving force by both shifting practice and ensuring that the organization is impactfully looking at its work through both lenses. ♫**



**Lori Villarosa** is the founder and executive director of the *Philanthropic Initiative for Racial Equity*.



**Lionel Milton,  
*Inner City Blues***

Internationally acclaimed New Orleans artist Lionel Milton uses his art to tell the stories of the Black American experience. *Inner City Blues* is a mural painted along Frenchman Street. "This mural is close to my heart because it features my daughter Ella," Milton says. "Looking through her third eye, she sees her own greatness and future. She also sees that humanity is essential over everything else."



**Lionel Milton, *Joy***

"*Joy* is a piece inspired by a feeling I get when I think about parts of my childhood. Being raised in New Orleans during Reaganomics was challenging, but I always loved it when my cousins would come over to the house. I knew I'd hear all the latest music and all the best jokes." This painting was featured by Ashé Cultural Arts Center in *The Art of Resistance*, a summer 2021 exhibit that explored the idea of creative defiance.

Lionel Milton ([lionelmilton.com](http://lionelmilton.com))

# Grantmakers as Changemakers: Lead an equity revolution

**There's power in process, and grants professionals can handily leverage their positions and drive equity throughout all facets of the grantmaking process. But seeing where you can step up and step in to make change happen might not be readily apparent.**

To explore how grantmakers have re-envisioned themselves as change agents, PEAK Chief Operating Officer **Dolores Estrada** led a roundtable with our two guest editors, Robert Wood Johnson Foundation Director of Grants Management **Adam Liebling** and Kenneth Rainin Foundation Director of Grants Management **Miyesha Perry**, and three additional members of the grantmaking community: Meyer Foundation Grants Manager **Andrew Brown**; Streamlife Consulting Philanthropic Advisor **Chindaly Chounlamountry Griffith**; and PEAK Cofounder and Salesforce.org Grantmaking and Program Management Industry Advisor **Ursula Stewart**.

**Estrada:** Our deep dive today will focus on how grants management professionals can leverage their positions to drive racial equity in their institutions—to become changemakers. Can you all take a moment and think about how you see yourselves as change agents?

**Stewart:** To be a change agent, you must feel comfortable in your own skin. As an African American born in the midst of the Civil Rights movement, I have always been called to be a change agent. In my career, I had to find ways to bring my voice to the conversation. That came from demonstrating to my colleagues that I had a holistic interest in the work of the foundation.

I didn't just do my work, I stayed informed around every aspect of the work that we did and had as much to add to the decision-making process as any of my colleagues or the board.



When it comes to racial equity, my goal is always to encourage staff and the board to take time for conversations with the communities we fund to ensure we are always perceiving our constituents accurately.

**“In my career, I had to find ways to bring my voice to the conversation. That came from demonstrating to my colleagues that I had a holistic interest in the work of the foundation.”**

**–Ursula Stewart**

**Brown:** There were no courses on grants management when I went to school, so I was learning along the way—as we are all still learning. As time goes on, you realize that you hold a lot of power as a grants manager. You're usually the one to see firsthand what your grantees are going through, where the hiccups are in the process for them. We need to do better as a sector to understand those pitfalls and how to lessen the burden on grantees and applicants.

**Liebling:** Back in the day, grants management attracted the kind of folks who enjoyed following a rulebook and checking off boxes. But personally, I just couldn't do the same thing day in, day out. So, at first, I was a change agent so I wouldn't get bored. Then I looked to change the organizations I worked at, to help them achieve their goals. It wasn't always interpreted that way, and I've been told on more than one occasion to assimilate into the culture, to know my place, don't rock the boat, don't make waves. But change doesn't happen without some tension and challenge to the status quo. And as Andrew mentioned, we in grants management do hold a lot of power to effect organizational change.

**Griffith:** I bring my experiences as the firstborn child of immigrant parents from Laos and who was also raised in Iowa; as someone who has faced many inequalities throughout my schooling and my career; and as a parent raising multicultural children in a predominantly white neighborhood. As a consultant, I use these personal experiences to help funders improve their grantmaking operations and racial equity practices.

And, in leading foundations through system implementations, I've had the opportunity to build partnerships with the grants management professionals who should be elevated as change

agents. As an external voice and a peer, I offer to highlight the value that their teams may not see: Grants managers offer such a unique skill set and cross so many responsibilities—in technology, knowledge management, communications, DEI, finance, nonprofit support services, and change management.

**Perry:** In terms of being a change agent, I think of even little things that should seem obvious but aren't in practice. Like in your hiring practices: Who are you hiring? What are you asking for in your job description? For example: Just to answer the phones in a foundation, you need a degree. Why? You can teach processes, but you can't teach soft skills like intuition or emotional intelligence—skills that are very, very important.

As a sector, we exclude lots of people with lots of experiences and voices by little things like requiring a bachelor's degree for entry-level work. For my team, I wrote job descriptions without an academic requirement. It's those little things that you can do on your individual teams to begin lifting up equity.

Sometimes you have to repeat yourself over and over again for people to hear you on a broader organizational level. The confidence to do that comes with experience or maturity—I didn't have that earlier in my career, but now I don't want to be anywhere where my voice isn't going to be valued.



**Estrada:** Change agents come from all levels of personal and professional experience, and it's a good call—and a big statement—to say you can be somewhere where your voice isn't heard,

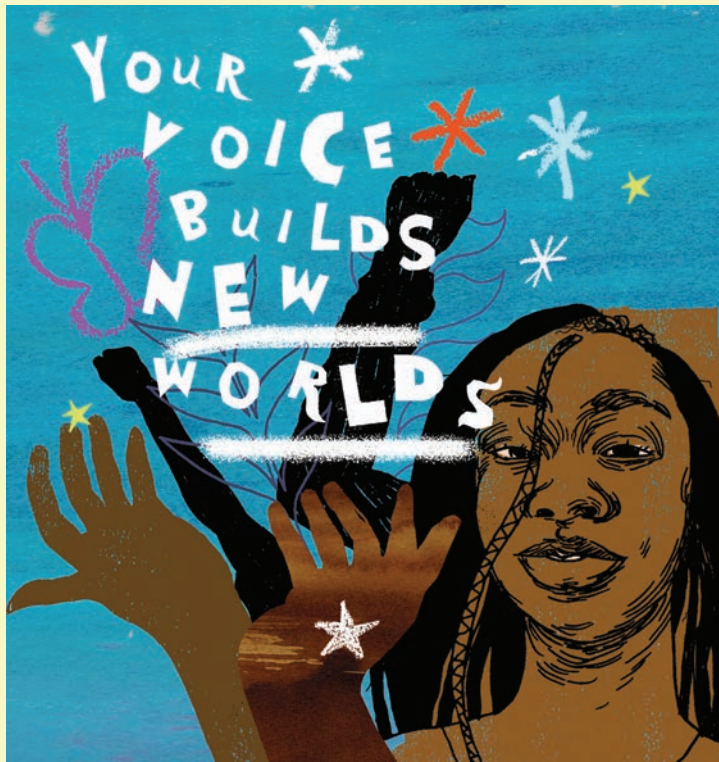
**“Change agents come from all levels of personal and professional experience.”**

**–Dolores Estrada**

especially in philanthropy. And sometimes it's taking the baby steps that help us get to those bigger questions.

With that in mind, what can we do to push change, whether that's a baby step or a big leap?

**Brown:** We cannot silo our work as grants managers. We have to look at this work holistically. To be serious partners in this space, we need to live out the principles of racial justice and equity in our everyday lives, and not just when we are at work. I also think grants management professionals can learn a lot from the grantees they're serving. Get involved with the work that your grantees are doing, prove to them that you are a trustworthy partner and that your foundation is committed to their work, that you are in the fight with them.



**Kah Yanghi, *Untitled***

"I wanted to make something that's as hopeful as the visions of the future that youth I've been around, my friends, and people I know have for the future," says artist Kah Yanghi, who created this piece for the The Center for Cultural Power (CCP), a women-of-color, artist-led nonprofit dedicated to "inspiring artists and culture makers to imagine a world where power is distributed equitably and where we live in harmony with nature."

"We need stories that inspire people to do more than just vote, but to come together to claim their power and create a new future," explains CCP Director of Campaigns Cristina Uribe. "Together, working with movement and artists, we can do that."

*Kah Yanghi (kahyangni.com)*

If your organization is offering opportunities to lead internal racial equity work, I highly encourage you to take that opportunity. Not only will you learn about your own biases and places that you can improve in, but you'll also be a model as to what a change agent can actually do in driving equity.

**Liebling:** Showing our foundations how we can change the practices of grantmaking—that's what gets us a seat at the table, and what gets foundations out of their navel-gazing rut. If you're asking about how to show the how, my recommendation is to take your entire grantmaking process, map it out from beginning to end, and look for the inflection points where you can introduce more inclusionary, trust-based, and equitable practices.

For instance, How are program officers sourcing and identifying the organizations they want to partner with? What are the eligibility requirements? How is the program being marketed and to whom is the application



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**—Andrew Brown**

process accessible? Who's reviewing the proposals, who's on the advisory committees, how are decisions being made? How is due diligence being handled? That's a big one, because you might be placing false risk on Black- and Brown-led organizations without consciously realizing it.

These are all things that grants management professionals can take tangible, concrete action on. They could cite each area and say, "Here are alternatives that provide new ways of working, and new ways of thinking, to drive the foundation toward more equitable practices."

**Griffith:** First, take stock of the data that you have and the information that grantees have provided, and take a solid day to really analyze the information you have in your grants management system. That information is collected already—why waste it?

Make time to leverage the power of data, determine the knowledge that can be extracted, and share those true narratives about your giving, not the false narratives that people want to hear. Be honest about what you're finding in the data to describe the successes or the pain points that are occurring within your grantmaking process. It's really about discovering the areas of opportunities and exploring, being willing to play with the information and showcase it with dashboards and graphics.



The second thing is to learn from your grantees. Take the time for surveys and one-on-one interviews. Whenever I'm in a grants management and implementation project, I really like to pilot an application not only to test

separated from our professional selves. I often tell mentees: You've got to decide your *why* and whether or not you can live it out where you are.

**Liebling:** Miyesha's point makes me think about how so many foundations have done demographic surveys of their grantees and have posted them on their websites. It's great; it's transparent. But then most don't say what they're going to do about it. And that's where grants management comes in.

Foundations proclaim their values—but to Chindaly's point, then there's the data. Grants managers need to show how things can change in order to bridge the gap between values and reality. Grants management is the key alchemy agent that turns the aspirational into the actionable.

**Estrada:** That's a great transition. What can we give to foundations as practical tools to help make this happen? What have you all used that we can share with our members?

**Perry:** One resource I highly recommend is ABFE's Equitable Evaluation Initiative, Responsive Philanthropy in Black Communities training. They have tools on their website to help you understand what inequities look like and how they come about, using a lot of very easy-to-digest examples. They also do a lot of work around foundation staff's perception of their organization—that is, determining where the foundation staff thinks they are versus where they really are. That's a very critical question, especially for organizations in the beginning of this work: Where are you? Because sometimes we're not honest with ourselves.



**Liebling:** PRE, the Philanthropic Initiative on Racial Equity, recently released a report called *Mismatched*, which speaks to Miyesha's point—how there is what foundations say they're doing, and then there's what

**“Be honest about what you’re finding in the data to describe the successes or the pain points that are occurring within your grantmaking process.”**

**–Chindaly Chounlamounry Griffith**

the functionalities of a new system, but to ask questions like, Is this question easy to answer? If not, how can we simplify? How long did it take you to fill out this application?

**Stewart:** What we're doing on a daily basis is filming a documentary that includes what we're doing in terms of racial justice and racial equity. The two things that go into that are, first, the data has to tell a story. The second is that, as much as we can, we try to humanize that data. That's how you enable people to envision those who we're funding—the communities, the grantees—and how we are supporting them.

There are some within an organization who are very close with the grantees, very close with the communities, but the decision-makers are usually board members, who are the furthest removed from the human side of our funding. So if you can, tell the story accurately with the data, and humanize that data as much as possible. Those are two huge things we can do in order to drive equity within our organizations.

**Estrada:** Data is a truth teller. That is key.

**Perry:** I always describe grants management as literally the center of all grantmaking in foundations. Grants management sits in the middle of the Venn diagram. We literally touch, and usually see, a little bit of everything—if you have your eyes open and are paying attention.

Pay attention to places where you might be able to contribute to the conversation. Maybe it's outside of your lane a bit, or outside of your wheelhouse a bit, but that's good. Different perspectives and different voices are necessary. Sometimes it takes raising issues more than once, and not being afraid to lift those things up. Because you're either going to figure out that your organization is committed to what it's saying in terms of values and racial equity, or you're going to figure out that they're not. And then you can make a decision about what that means for you.

No matter what stage of your career you're in, most of us in this work are living our values, and the personal isn't really

**“Grants managers need to show how things can change in order to bridge the gap between values and reality.”**

**–Adam Liebling**

they actually do. That report is a great wake-up call and a great accountability tool, but PRE also has guides on how to operationalize racial equity and racial justice at foundations. The Philanthropic Initiative also has a whole toolbox on incorporating racial equity into grantmaking.

My favorite resource, which I share with anyone who will listen to me, and more importantly, those who won't, is Vu Le's blog NonprofitAF. He gets to the heart of so many issues in our sector, and he cuts deep, but he does it in a way that is digestible—and, frankly, hilarious.

**Brown:** One is the obvious: each other. Being involved with PEAK for the past decade has been such a resource for us at the Meyer foundation—to be able to tap into the knowledge of all the folks who are on journeys similar to us, and who are starting to operationalize equity.

The People’s Institute for Survival and Beyond is another amazing resource. Their Undoing Racism workshop was one of the most effective that we went through. These trainings are Black and/or people-of-color-led, and they really uncover

internal biases and how institutions are holding onto aspects of white supremacy culture. It teaches you how racism is woven into the fabric of each and every one of our systems, including the philanthropic system.



**“Pay attention to places that you might be able to contribute to the conversation. Maybe it’s outside of your lane a bit, or outside of your wheelhouse a bit, but that’s good.”**

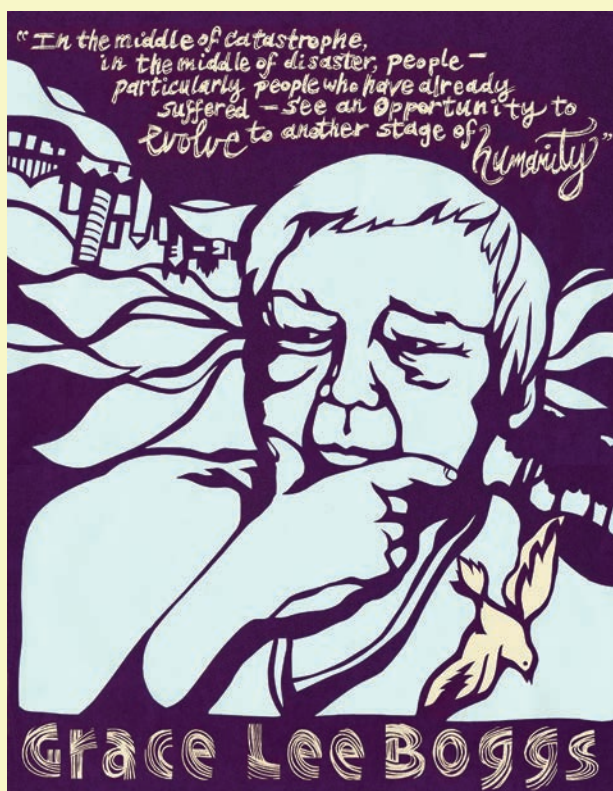
**–Miyesha Perry**

**Stewart:** A resource that I’m fortunate to have are the 12 force groups at my organization: We have BOLDforce for the Black community, Genforce for the intergenerational community. You can join as a member of those communities, and you can join as an ally as well. Within our organization, we always say that you can lead from the top down and also the bottom up, and this is a way that everyone’s involved in the process.

And I think that’s what we’re doing at PEAK as well. Alliance groups bring us together even more, demonstrating not just to our members, but throughout the entire community, how we are leaders in this area. In leading by example, we’re helping our members to lead as well. They can do the same thing that we’re doing within their own organizations; no matter what size it is, they’re seeing that they can be those leaders to make those changes.

**Griffith:** PEAK has been a tremendous resource for so many of the partners that I’ve worked with. And some of you might have already heard of PEAK’s survey report *Insight, Impact, and Equity: Collecting Demographic Data*, showing how funders have been engaging with demographic data around the projects they support. It gives you the opportunity to see the trends in how demographic data is collected.

**Estrada:** Thank you all for helping inspire our members to move forward in their own institutions, and to drive that racial equity conversation a lot further. I think we can make magnificent changes in 2022. ▲



**Bec Young, Grace**

“Grace Lee Boggs was a deep thinker and revolutionary activist who turned problems and concepts upside down in her mind to see them from a new perspective,” artist Bec Young says in her statement on her screen print of the Chinese American activist. “She believed it was possible for humans to evolve into humankind.” Young, a Detroit-based artist who specializes in printmaking, papercutting, illustration, and installation pieces, is a member of the Justseeds Artists’ Collaborative.

*Justseeds Artists’ Collaborative*  
([justseeds.org](http://justseeds.org))



# Making All Feel Welcome

**“We don’t have a diversity problem in this sector,” ABFE CEO Susan Taylor Batten told PEAK’s Satonya Fair in their CEO:CEO conversation last fall. “We have a retention problem.”**

**For its 2014 study *The Exit Interview*, ABFE found that Black professionals were leaving philanthropy because of the inhospitable cultures at grantmaking organizations. Unfortunately, this is not unique to Black professionals. As we read in other studies and hear from our community and PEAK’s Asian American and Pacific Islander, Black, and Latinx caucuses, all people of color, women, and people who identify as LGBTQ+ or as having a disability have similar experiences. While people from these different demographics might be included in how their organizations do business, they might not necessarily feel like they belong—that they are truly a part of a community of peers where their contributions are appreciated and help to make an impact.**

We asked three members of the PEAK community—Argosy Foundation Program Officer **Isabella Gargiulo**, Energy Foundation Senior Director of Grants Management **Tiauna George**, and Native Americans in Philanthropy CEO **Erik Stegman**—to offer their reflections on challenges they’ve faced and advice for organizations and colleagues. As their essays make clear, there are simple ways you can lead the charge so that peers and leaders also become deeply committed to cocreating an organizational culture of belonging for all.

## **Jen Bloomer, *Ending Racism Begins Inside Ourselves***

Jen Bloomer sees art as a potent means of engaging with the community, reshaping the world around us, and facilitating personal and collective healing. The founder of Radici Studios in San Francisco, Bloomer has painted and taught art internationally for the past two decades and her activist art has been used nationally at in-person demonstrations for social justice and across social media platforms. She created this piece in the fall of 2020 as part of Cultural Creation for Collective Liberation, a project mounted by Showing Up for Racial Justice (SURJ), a national network of groups and individuals that works to organize white antiracists so that they can fight for—and engage others to fight for—racial justice.

*Jen Bloomer (radicistudios.com)*



# The Power of *Comunidad*

By Isabella Gargiulo

I cannot adequately express how excited I was when last spring I heard that PEAK Grantmaking was launching a Latinx caucus. I had been wanting a space such as this since I joined back in 2013, and it was finally happening

Why does this matter?


It's not just because being in *comunidad* feels amazing and life-affirming. It also feels powerful to realize how much our experiences overlap. A common thread emerges: Latinxs enter philanthropy and immediately face multiple barriers rooted in the very architecture of the sector.

These barriers manifest as an unspoken hostility to Latinx authenticity and expression of our cultural attributes through our work, lack of opportunities for input at a higher level, as well as decreased opportunities of advancement. Leadership doesn't look like you, so you keep your ambitions at bay. Underlying all of it is a constant pressure to play along that implicitly signals to us: Adapt, or *adiós*.

So, of course we assimilate. I hear from my PEAK colleagues of feeling the need to conform in ways that often feel uncomfortable. Tone down expressive, emotive communication style; tone down the clothing (not *those* hoop earrings for the office!); and try our hardest to speak English correctly if it is not our native language. Adapt our chronemics; leave behind our collectivism in favor of individualism. Latinx professionals adapt to being tokenized and to fulfilling the unspoken role designed for us: Be in the room, but not at the table. Be an entry- or mid-level professional, but not a leader.

**“What gaps and communities are being overlooked because our lens, our lived experiences, and our perspectives are not present in decision-making?”**

This type of assimilation has a profound impact on the sector. For example, when foundation leaders don't look like the communities they serve, just how effectively is philanthropy tackling important issues? What gaps and communities are being overlooked because our lens, our lived experiences, and our perspectives are not present in decision-making?

Of course, our community is diverse, and I am grateful that many of us have felt respected and represented in their institutions. But in conversations with my peers, I have learned this is not the case across the board. Regardless of whether Latinx folks do or do not feel represented, the Latinx community at large stands to gain much from other professionals in philanthropy. Each time we make a connection with another Latinx professional, each time we lift a colleague's voice or work to our peers and to the field, each time we have a *cafecito* together, we help build the strength in numbers that so often becomes the driving force for systemic change. No one can do this alone—and I am so grateful that PEAK is providing us with a space to nurture our strength and to celebrate our voices. We are rich soil in which fantastic things will grow. 

*Isabella Gargiulo is a program officer at Argosy Foundation.*



# Break Down the Barriers to Belonging

By Tiauna George

What does it mean to belong? I think of it as a deep sense of connection to something or someone. It's knowing we're valued, appreciated, and our presence brings a welcome and unique perspective to the collective culture. Working in the philanthropic sector for about 15 years has allowed me to take for granted whether or not I felt like I belonged in a certain place. Power, even proximal power, sometimes does that. It makes you think that you've earned something simply because you're there. But to create a culture of belonging, we must be intentional. In order to create the conditions necessary for someone to feel like they belong, we must prioritize all of our people.

One of the biggest transformations in the philanthropic sector to date has been the evolution of, or at least a renewed focus on, diversity, equity, and inclusion (DEI). Foundations both large and small from various parts of the country are recognizing the importance of DEI and are making commitments with both their mouths and their wallets to mitigate against persistent disparities in their communities. And while this is important, because a culture of belonging is predicated on inclusion, most of the progress to date has

focused on diversity, but we haven't quite figured out how to follow the through line to address inclusion and equity. Many of us in the sector want to use our unique positions to disrupt tradition and deploy risk capital to affect the kind of change that's needed in society. However, we still have a long way to go. In part, this is because many of us do not understand what it means to cede power and create an environment where all voices are heard. Too often, people feel as though they don't belong because their voices have been minimized or ignored, or because they don't look or think the same as others, often have difficulty expressing in tangible terms what that feels like to someone who has never faced the same struggle.

Perhaps though, the biggest barrier to fostering a culture of belonging is that we never ask about the lived experiences of others. We're all moving too fast. Intention takes time. Giving everyone a voice takes time. Doing this right takes time. In the rush to get grant dollars into communities, we prioritize efficiency over effectiveness, and return on investment over relationships. We don't take the time to learn from, and listen to the wealth of information diverse voices bring. Creating a healthy culture is the responsibility of all of us, but too often the burden of calling out bad actors, perverse environments, and unhealthy power dynamics rests on those with the least amount of power.

**“Perhaps though, the biggest barrier to fostering a culture of belonging is that we never ask about the lived experiences of others.”**

Reflecting on the concept of belonging made me realize that I have never been asked by anyone if I felt like I belonged in a given environment. Although I have felt like an outsider at various times throughout my career, the onus was on me to assimilate into a culture that sometimes felt foreign and contrived. In order to make sure that we're fostering an environment that prioritizes belonging, we must slow down. We must ask ourselves whose voice is missing; we must cede power and listen to those with different lived experiences, and we must be intentional about making sure there is a place for everyone at the table even if it takes a little more time. I promise, the return on investment is worth it. ▲

*Tiauna George is the senior director of grants management at Energy Foundation and is a member of PEAK Grantmaking's board of directors.*



### **Destiny Belgrave, *They Hold Me***

In 2021, The Laundromat Project (TLP) commissioned Bajan/African American artist Destiny Belgrave to create this paper cutting for their Fulton Street Window, an outdoor community art installation by a local artist. Based in Brooklyn, New York, TLP “envisions a world in which artists and neighbors in communities of color work together to unleash the power of creativity to transform lives.”

“At its core,” writes Belgrave, “my art upholds and uplifts black figures, activities, spaces, and objects, while portraying these entities as spiritual vessels and sacred experiences. I am mainly influenced by my own family, the domestic spaces that they inhabit and the many rituals, stories and photos that come from them. While sifting through these influences, I delve into the themes of Blackness, family, bonds, spirituality and culture. When all of these things combine within the art, the piece that is created acts as a memento and a preserver for the lives and narratives that are in it.”

### **Raychelle Duazo, *Together We Are Home***

Raychelle Duazo is a queer femme Filipina-American illustrator and tattoo artist based in Seattle. She uses a combination of dreamy aesthetics and vibrant colors to visually explore themes of queer identity, love, visibility, transformative grief, and diaspora. This piece was originally commissioned for *Sanctuary: Design for Belonging*, an art exhibit that examined how urban areas can respond to the global refugee crises by creating welcoming environments where displaced persons can feel like they belong. Amplifier, a nonprofit that uses art to elevate social movements, was a cocurator for the show and later made *Together We Are Home* available to download and use via its website.

Above: Destiny Belgrave ([destinybelgrave.com](http://destinybelgrave.com)).

Right: Raychelle Duazo ([raychelleduazo.com](http://raychelleduazo.com)) for [amplifier.org](http://amplifier.org)





## Inclusion Begins With Trust

By Erik Stegman

As John A. Powell describes it, belonging is “more than just being seen or feeling included, belonging entails having a voice and the opportunity to use it to make demands upon society and political institutions. Belonging is more than having access; it is about the power to cocreate the structures that shape a community.”

In philanthropy—and especially in the process of grantmaking—the experience could not be further from this definition of belonging for most frontline nonprofit organizations. Why? Because philanthropy was constructed to protect wealth and power. It was also constructed to slice and dice, dissect, and reframe solutions according to the funders’ intent, privilege, and power.

As a leader of a member organization, I listen to organizations working to invest in movements for Tribes to control their own land again (as was promised through sacred treaty obligations). I listen to Hmong farmers who are creating new, intergenerational food systems and economies. I listen to Indigenous community leaders from Mexico who are working to support refugees and reconnect them with land in urban areas. And I listen to powerful Black women leading movements of young Black women who are growing “seeds to souls” in the ground their ancestors tilled.


Listening is about creating a culture of belonging across communities. But one of the most frustrating commonalities among funders in their philanthropic practices is that they are centered on silos and practice in philanthropy.

Nothing about these structures is about cocreating, lifting up voices, or creating access to resources in meaningful ways.

One of the most hopeful messages to come from everyone in this conversation was the way funders reacted during the pandemic. After years of advocating to the sector about general operating funding, flexible timelines, multiyear funding, and cross-silo work, the crisis we continue to face in the pandemic should be seen as a learning moment for how grantmakers can truly make a difference in practice.

I have learned that the more you can do as a grants manager to advocate internally for trust-based, flexible, multi-year, general-operating resources, the closer you’re shifting the field to belonging. Nonprofits on the ground, and advocacy organizations like Native Americans in Philanthropy, have been shouting this from the rooftops for years. But so many funders finally answered our call almost overnight (considering the slow pace of philanthropy) when this pandemic hit.

**“Use this moment to show that the sector can do something different. Think about your grantee partners who are creating a culture of belonging every day.”**

Use this moment to show that the sector can do something different. Think about your grantee partners who are creating a culture of belonging every day. Document what those partners are doing and reference to your colleagues inside your organizations that the sky didn’t fall once you shifted how you managed your grants. It means more than you realize when it comes to belonging. 

*Erik Stegman is the CEO of Native Americans in Philanthropy.*



# The Impact of Putting Equity at the Center of Strategy

The Annie E. Casey Foundation for decades has worked to embed racial equity and inclusion in its operations and share its journey as a road map to other funders ready to embark on a similar path. Currently leading the charge is President and CEO **Lisa Hamilton**, who ascended to the helm in 2019 after serving as executive vice president and chief program officer, as well as vice president of external affairs, leading efforts to provide data, analysis, research, communications, and policy solutions to fortify the foundation's ability to reach its goals.

As Hamilton shared in a recent interview with PEAK President and CEO **Satonya Fair**, she hopes that sharing the Casey Foundation's challenges and triumphs will embolden other organizations. "We know we can't change the world by ourselves," Hamilton says. "No matter how deep the work we do as an institution might be, we've got to help facilitate others' growth and development in this space." The two CEOs explored how to put equity at the core of your strategy so that change emanates from your organization and runs throughout the communities you work to benefit. Here are a few highlights from their conversation.

**Fair:** Creating an institution that is equity-centered from its mission statement to its programming to its operations is a long journey. And there are so many out there who are just beginning this journey. How did Casey start this work and what has it done well to ensure that everyone has been included along this journey?

**Hamilton:** We had to acknowledge a fundamental truth: Universal strategies are not going to get us where we want to go. A rising tide does not lift all boats. It's like having a classroom of children and you realize some of them can't read very well. You dig a little deeper and realize these kids can't see and need glasses. Those children need targeted interventions. Racial equity is no different. Different children and communities face different challenges. We have to be unapologetic about pursuing targeted strategies to improve outcomes for families who have had targeted strategies directed at them to hold them back.

We had to improve how our work brings communities of color to the table as problem solvers and codesigners of solutions. But when we started this journey seven or so years ago, there was a lot of discomfort among staff about leading conversations with racial equity at the center. So, we helped them do that. We had a process to help our staff understand what we meant by equity. We had a shared language. We could talk about what targeted strategies look like in each of their specific bodies of work.

Targeted strategies are needed in this moment. And that's what we've really tried to unlock in our staff and with our grantees. Then when you pursue them, you see how things get better.

**“We have to be unapologetic about pursuing targeted strategies to improve outcomes for families who have had targeted strategies directed at them to hold them back.”**

**Fair:** Casey has really modeled why it's so important to both collect and analyze demographic data for your grantees, your consultants, and your communities. How has that approach helped Casey be a more equitable grantmaker?

**Hamilton:** You need to look at the data to figure out what's going on—and not just at a surface level. We disaggregate data by race to best help children be successful and get them where they need to go. And even when you disaggregate data by race, there are subgroups within racial populations that might be struggling. For example, people often think of the Asian community as monolithic and that Asian children are exceeding their white peers on many indicators. When you disaggregate that even further to ethnic groups, you might see

that Vietnamese, Hmong, or other groups of children are not faring well at all. You have to look into finer cuts of the data so that you can see where you need to focus your efforts.

**Fair:** Talk about shifting toward the South and Southwest regions.

**Hamilton:** When I was the vice president of external affairs, I was responsible for KIDS COUNT [a Foundation effort that documents child well-being in every state and across the nation] at the time and I kept looking at a heat map we updated annually that shows where kids are doing well and where kids are struggling across the 50 states. Every year, the South and Southwest were on fire. I looked at where Casey was doing its work and we were ignoring the South.

I think we viewed the South as hard, so why would we go there? And there was something fairly thoughtful in the approach of going to the places where maybe our work might be better received. But we could not continue to ignore the South and the Southwest where the majority of people of color in this country live. It's like being a firefighter and ignoring the biggest fire. We can't do that.

Consequently, my work focused on our policy efforts in these places. I had responsibility for units across our program areas: policy advocacy, communications, the racial equity team, and KIDS COUNT. And I thought, if we are trying to do targeted strategies, what am I supposed to do with the bodies of work I manage when I'm not responsible for a particular outcome, like workforce development or child welfare? Eventually, other Foundation leaders focused on that region. And focusing on the South has fundamentally changed Casey as an organization—and not just in terms of the work I led, but our program areas have now pivoted as well.

And the thing we also realized is that you have to employ different strategies. What we were trying in Maine does not matter to people in Mississippi. So, you need to figure out what's going to work in Mississippi. That really helped our staff think differently about strategy. We wouldn't have built those strategy muscles if we had continued to pursue our work in the same way that we had done before.

**Fair:** We have a lot of funders who've been doing what they've been doing for a long time. And I have those conversations with folks, and we have to encourage people to lead the change process. Just because you've always been in this place does not mean you're stuck there. So when you think about driving change, how do you continue to empower the staff and your peer funders to really take up racial equity work?

**Hamilton:** One of Casey's key roles is a convenor. Often, we bring our networks together to learn. In building the capacity of our KIDS COUNT network to take up racial equity work, for example, we developed institutes that gave them access to experts and enabled them to learn from one another.



Peer learning was key to getting organizations unstuck. That’s how most practice change scales up. Casey is lucky in that we thought about the impact of networks and peers from the beginning of our work. The KIDS COUNT network is a group of 53 grantees across the country and US territories. If we are talking about racial equity, the folks in Texas are going to talk to the folks in Arkansas, and they’re going to talk to their peers in Louisiana. Each one knows that the others are doing the exact same work that they’re doing. They are inspired by one another to see what they’ve done, and they can problem-solve together. Also, people trust friends. They find courage and inspiration from the people they know, who have walked the same path with them, and who will help you through the rough spots of trying to do something new.

**Fair:** We hear from so many foundations that they find a lot of strength in being able to talk about the ups and downs.

**Erica L Chisolm, *Shine Different***

Erica L Chisolm is a mixed media artist and activist based in Atlanta, Georgia. She uses acrylic paint, tissue paper, decorative paper, twine, and other elements to create portraits with rich textures that represent the beauty and imperfections of being. Her hope is to use public art to bring health, creativity, love and a sense of identity to the cities in which she works. This mural located in Atlanta, Georgia, features portraits of Black women in careers where Black women have historically been underrepresented: marine ecologist Alanna Vellacott, harpist Madison Calley, composer Ashley Keiko, and a self-portrait of the muralist herself. “I had the honor of creating a mural of living, thriving, beautiful young women of color, living their dreams and sharing their fire with the world. I am also honored and grateful to hold space with each of you. May we continue to shine and continue to encourage others to shine different.”

*Erica L Chisolm (elcreative.co)*

**Hamilton:** And remember to share the success stories. We often have the sense that progress isn't being made. But there have been incredible home runs where we have reduced the numbers of kids of color who are incarcerated, increased the numbers of young people of color who are getting apprenticeships or decreased the amount of violence in neighborhoods of color. Remember, there is a reason you do this: You can have great success. And that's a message people don't always get.

**Fair:** I feel like I regularly see stories about Casey leaning in with a large investment in the infrastructure behind small, nonprofit organizations. Why is that a priority and how does it help Casey meet its strategic objectives?

**Hamilton:** As we deepened our racial equity work, we realized that there weren't always the program models, programs, or strategies developed to serve kids and families of color, and that without the right programs, policies, or tools, we weren't going to get to where we needed to go. And so, in a variety of places across the foundation, we started working with smaller nonprofits of color because they were innovators. Casey is about funding innovation. And as we were doing more racial equity work, we realized we needed more innovators focused on kids and families of color. And they were sometimes program developers of color.

We created a pipeline to support these developers of color because we saw that there was real innovation going on that we wanted to fund, and we knew that their work was essential to us succeeding in our work. This is important strategic work, and I'm not funding it because I'm a person of color leading an organization. I work to improve outcomes for kids and families of color. These are innovators who are doing that work. And so, I'm funding them because they achieve a strategic goal. It makes perfect sense and has been really impactful.

**“We created a pipeline to support these developers of color because we saw that there was real innovation going on that we wanted to fund, and we knew that their work was essential to us succeeding in our work.”**

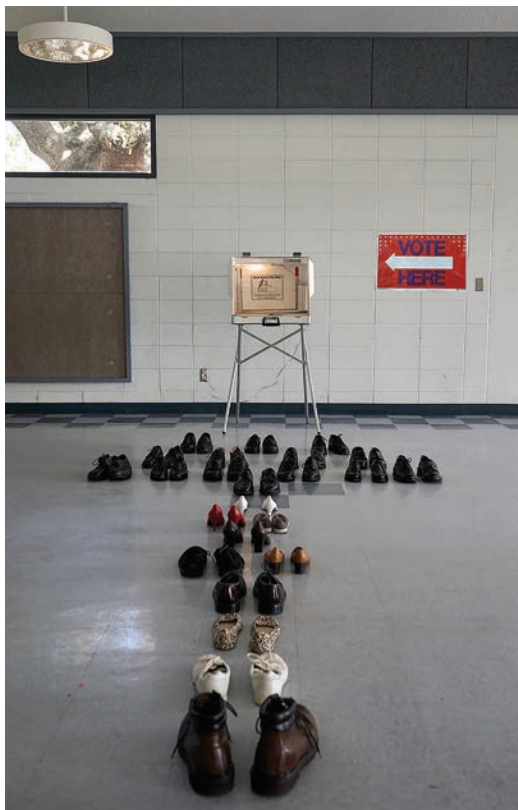
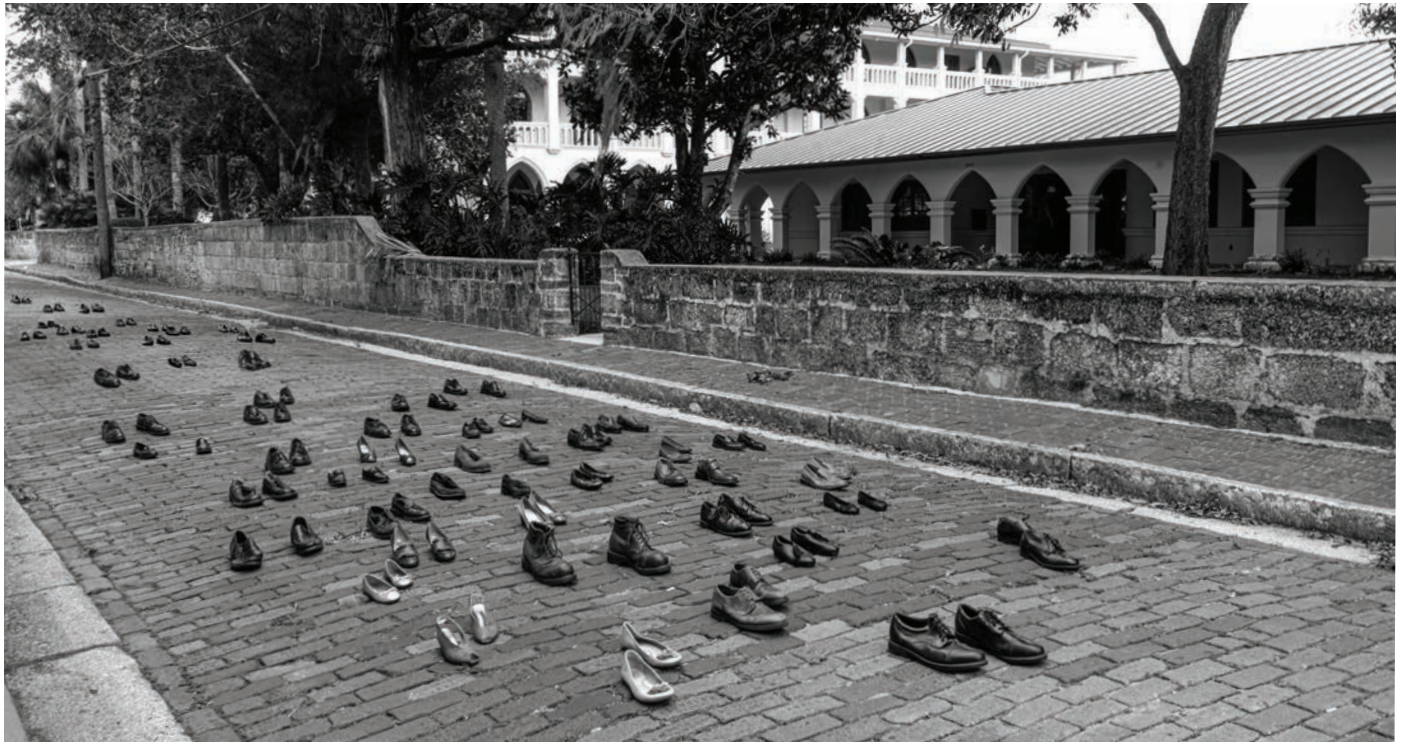
**Fair:** Belonging is one of the topics that we address in this edition of the *Journal*. From my experience as a Black woman, I've often found myself the “only” in a room, and it's not just in terms of what I look like. Sometimes it was because of my perspective or the way I was approaching a problem. So, as you take off your CEO hat, how have you found or made your own place in philanthropy?

**Hamilton:** I have been in spaces where I wasn't expected to be since I was six years old. I was bussed across town to integrate schools in Atlanta and was one of very few Black children at all-white elementary, middle, and high schools. I went to huge public universities and law school where I was, again, one of very few people of color in my classes. Being different is something I've become accustomed to, and learning how to use that difference to break stereotypes and bring new perspectives into a conversation is something I've been practicing since I was six years old. By the time I became an adult and I was in corporate spaces or private philanthropy spaces where I was one of or the only person of color—or sometimes woman—in the room, I had decades of experience being confident in who I am. My family and my friends were always in my head to root me on and let me know that, even though I might look different in this room, I am loved—so I should be myself in these spaces and be authentic.

The thing that I love about the role I have now is that you can hear that my journey was often about beating the odds. And the aha moment I had when I came into private philanthropy was that I could use this to change the odds. The most life-changing, affirming, and motivating realization I had was to take that journey of being by myself and speaking up for myself and to turn that into power, to open the door for other people. That gets me up every day. I love the idea that there will be other little Black girls who come after me, who won't be the only child in their gifted and talented class, won't be one of only 10 people of color in their law school class like that. That excites me because I know I'm not unique. There are so many brilliant young people who don't get all of the opportunities that they need to thrive.

**“The most life-changing, affirming, and motivating realization I had was to take that journey of being by myself and speaking up for myself and to turn that into power, to open the door for other people.”**

The good news is that, almost 50 years after I rode that first school bus, there's a shift happening in certain spaces. There are more women of color leading foundations. There are more people of color joining C-suites, and we see political leadership changing in different ways. That's what inclusion and belonging looks like—more people who have the opportunity to pursue their dreams and can see folks who look like them in these spaces. ▲



**Lenny Foster, *Emancipation Day Parade, The Right to Vote, and The Lunch Counter Sit-In***

“Upon arriving in St. Augustine [Florida], I discovered a deep history, largely unknown to the public at large, about the history of African Americans in our country [and] I learned a hidden history of my own African American heritage.” This newfound knowledge became the focal point of Foster’s art, including his 22-part series *Where We Stand*, which explores the interconnection between history and the continuing fight for social justice. “The decision to use shoes as the vehicle for storytelling initially came as a result of the controversy surrounding the kneeling of professional athletes protesting racism in America: We have stood, sat, and knelt for many a high and honorable cause, not to mention, the struggle for everyday existence.”

*Lenny Foster (galleryonefortyfour.com)*



**Miha Sarani,  
*Show...of Hands, Go on!*  
(#BlackLivesMatter)**

Elevating the experiences of those who have traditionally gone unheard has been a throughline in the art of Miha Sarani. "Learning about the history of portraiture, and particularly how it pertained to people of color, I wanted to do something that would help show the strength of an individual and help communicate the achievement of an individual."

Sarani is an educator at the Kirkland Arts Center, a nonprofit, where he ensures that inclusion and questioning tradition is at the heart of his instruction. "I believe it is a privilege and a responsibility to build community beyond [the classroom], allowing class experiences to have deeper inquiry with others throughout society."

*Miha Sarani (mihasarani.com)*

# Use Demographic Data to Drive Equity and Impact

**By Kelly Brown**

Increasingly, funders are professing commitments to equity and a desire to be more relevant and reflective of a changing world. For many, a commitment to these issues is implicit in the goals and nature of their programs and grantmaking. But assessments of the degree to which funders are in fact addressing disparities, reducing inequitable access to resources, or generally advancing equity don't always have the data to back them up. For example, according to PEAK's 2020 flash survey of 165 grantmakers, 43 percent of respondents said they were providing extra operating support to existing grantees in response to COVID-19, but only 9 percent said

they were using demographic data to guide those efforts, even though it was known in the spring of 2020 that COVID-19 was disproportionately impacting Black and Latinx communities.

Without data, strategies to advance equity are uninformed and therefore unlikely to be effective. Consequently, funders need to be clear upfront on how they will integrate demographic data into their processes to provide important insights on how their grant dollars are deployed and how to change and refine their strategies and approaches.

## Focus on how data will be used

Some funders are beginning to understand what social scientists, political scientists, business leaders, government officials and many others have always known: demographics matter. How problems are framed, how interventions are structured, and how strategies for outreach and engagement are developed are all deeply connected to the backgrounds and lived experiences of both those who design programs and those who receive funding. In addition, understanding the dynamic nature of the contexts in which foundation efforts are unfolding is crucial to assessing whether any effort is impactful and effective. Demographic information is one essential element to understanding how to assess any strategy seeking philanthropic support.

The goal of using demographic data to advance diversity, inclusion, and representation is critical to a funder's understanding of whether the programs they support align with their own organizational values. For example, many funders collect data to assess the diversity of the leadership of the groups in their grantmaking portfolio or to understand how many groups are led by people of color. These goals focus on assessing grantmaking decisions that have already been made with respect to the equitable distribution of foundation resources.

But this frame limits the full power of collecting and using demographic data. Funders need to go beyond asking organizations to check boxes about leaders and staff and help these organizations really understand their stakeholders and constituents, as well as their leadership and organizational cultures. The rapidly changing demographics of communities across the country, the dynamic nature of identity, and the expanding degree to which people want to be seen for who they are demands that this data be engaged in more nuanced and disaggregated in more ways than just sharing a dashboard or slide deck. To do this, funders must build their own internal capacity to understand the salience of demographics for their various program areas. Without this, work can be based on biases, outdated assumptions, or limited to overt commitments to a set of values with little connection to improving strategy.

Grants management professionals—who are often on the frontlines of engaging nonprofits around information that informs decision-making—can help drive insights that lead to action. With that in mind, here are three ways in which grants management professionals can ground the relationship between funders and nonprofits in a data-driven reality.

By starting with how you will use data to strengthen programs, reach underserved or underrepresented communities, or ensure that resources are deployed effectively in an increasingly diverse world, foundation staff must design tools and processes that don't just document diversity, but which build the capacity for this diversity to inform strategies and draw upon its strength. Grants management professionals can help design these tools and systems to capture inclusion in ways that balance the tension between complexity and manageability by helping to keep the focus on what level of demographic detail funders actually need to inform feasible changes and strategy.

**A group of Black-led nonprofits in the Bay Area received significant general support and capacity-building resources from a local donor to strengthen their programs serving youth in a neighborhood perceived to be overwhelmingly Black. The capacity-building support allowed them to gather census- and zip-code-level data on the youth population in the neighborhood, which revealed that 40 percent of the youth in the community were Latinx and/or Asian American and Pacific Islander—leading to shifts in strategy and staffing that improved outreach to all neighborhood youth.**

Here are three key questions to ask to help your organization determine and articulate how demographic data will be used:

- 1. How will we use the demographic data we collect to strengthen and inform strategy?**
- 2. Are we prepared to make changes to our programs and/or approach based on what the data may reflect?**
- 3. Do we have the capacity to effectively engage nonprofits about how we will use this data to strengthen our impact and how they can use this data to strengthen theirs?**

## Center nonprofit needs and capacity

Nonprofits grapple with the tension between collecting the data they need to inform strategy and the data they need to report to funders. Too often these are not the same thing. Most nonprofits are deeply engaged with understanding the complexity of their stakeholders, from board members to affected populations. Most nonprofits, especially small ones, are deeply rooted in communities and realize that knowing the full complexity of their constituents is essential to effectively engaging them. But many struggle with building the core capacity to collect and use this data in part because they are burdened with numerous and disparate requests to report on it.

Funders new to demographic data collection are understandably concerned with organizations struggling with this tension. This is why it is so critical for funders to be crystal clear on the information they need from nonprofits to strengthen their funding strategies and on what they are actually likely to change as a result of having it. It is also critical for funders to actively partner with nonprofits to understand their data-collection needs and capacities and to assess how to best support them in collecting and using data to strengthen impact.

Here, grants management professionals can help surface an understanding of what nonprofits face and distill what is feasible and relevant with respect to data management and data systems. Grants management professionals can bring their specialized knowledge to bear on assessing nonprofits' priorities and capacity not only to meet reporting requests, but more importantly to align the data that funders request with the

data and systems that will allow nonprofits to increase their insight and effectiveness.

**A regional community foundation learned that a significant level of statewide funding was available to provide COVID-19 relief to underserved and disproportionately impacted constituents. But none of this funding was coming into their community despite the large presence of heavily impacted residents. Further research revealed that many nonprofits serving these communities lacked the capacity to collect the data required to qualify for funds. The foundation launched an effort to collect, compile, and share this data which stimulated the infusion of much needed resources to address the disparate impact of the pandemic.**

Here are three key questions to ask to help your organization best support grant partners in the data collection and reporting processes:

- 1. Do we understand the current capacity of the groups we fund to collect and use this data on their stakeholders (both internal staff and constituents)?**
- 2. Do we understand how organizations may be using and/or reporting this kind of data to other supporters or funders?**
- 3. Are our requests for this data aligned with the broader field? If not, how do our unique requests add specific value to our strategy and approach in ways that demonstrably strengthen impact?**

## Leverage your expertise

On the frontlines of program data, grants management professionals can spot trends, assess nonprofit capacity, and build systems that help funders collect and embrace demographic data so that it provides insight. Grants management professionals can be attentive to and proactive in building efforts that strengthen nonprofits rather than burden them. They can also build expertise in trending demographic data collection methods—and how those methods contribute insights that are crucial to assessing the foundation's impact.

**A large national foundation launched an effort to strengthen its ability to understand the racial and gender makeup of the individuals who staffed and led the groups it supported. The foundation engaged a field expert to train and prepare its grants management team to support program staff's ability to understand and ground demographic data in the foundation's strategic approach and to connect this data to its emergent commitment to diversity and equity more explicitly.**

Grants management professionals have access to a robust peer community that they can draw upon to stay abreast of current trends and good practices. They are also well suited to provide insight on how to integrate practical approaches to collect data and strengthen aligned systems. You can elevate the value of your expertise as a grants management professional by asking these three key questions:

- 1. Do our data collection systems allow for nonprofits to provide and/or repurpose data they may already have?**
- 2. Can our systems produce reports or information that strengthens the field and supports the work of the sectors in which we fund?**
- 3. How can we contribute to building field-wide capacity for the social sector to make the most effective use of this essential data?**

**Kelly Brown** is the founder and principal consultant of Viewpoint Consulting.





**Ashley Lukachevsky,  
Build Your Own Table**

Raised in Honolulu, Hawaii, Los Angeles-based artist Ashley Lukachevsky sees their work as a tool to fight for social and climate justice. "I'm all for taking a seat at the table," they say of this piece, "but I'm even more interested in what it looks like to build a new table altogether and create something new and transformative."

Ashley Lukachevsky  
(ashleylukachevsky.com)

# Champion a Culture of Allyship

**Allyship is more than empathy. Allyship means seeing and leveraging the privilege you possess to be an active stakeholder in the interests of those with less privilege and a committed partner in changing the systems that diminish them. It means being self-aware, courageous, and committed to championing others. Conceptually, this might seem overwhelmingly complicated, but there are many simple things you can do to be a true ally.**

To help our members think about how they can champion a culture of allyship inside their organizations, we invited several PEAK members, partners, and friends to share their thoughts: **Jaser Alsharhan**, director of programs, Grantmakers for Effective Organizations; **Kelsey Andersen**, assistant vice president, grants associate, Citi Community Investing and Development, Citi Foundation; **Richael Faithful**, a healing justice practitioner; **Rachel Gonzales**, program director, Animal Assistance Foundation; **Jody Marshall**, housing opportunities program associate, Meyer Memorial Trust; and **Jenny Zhang Morgan**, grants officer, Robert W. Woodruff Foundation.

## Self-reflection is an important component of allyship, but we've observed some funders using it as a cop-out to not take urgent action. As Vu Le once said, "The road to hell is paved with book clubs." What are your recommendations to funders starting on this journey?

**Marshall:** Philanthropy is not just about grantmaking. Consider what other actions you can take that use your organization's positional power to leverage other resources. At Meyer, we've released op-eds and articles. We came out with a statement for George Floyd, like many other organizations, but we've backed it up with a \$25 million initiative, Justice Oregon for Black Lives. It is just now funding its first \$5 million in the community. This was the first time where we went out to the community and asked specific questions about what they wanted us to do with it.

**Morgan:** Not every foundation is ready to stake a multi-million-dollar commitment to racial equity when they don't know what will be funded. Examine your mission and values. Does equity fit? If it does, can you implement it in a way that honors your ethos, legacy and style? And while you know best how to effect change in your organization, have the humility to admit what you don't know and look for help outside your walls. Carry as much patience and grace as you can for the journey. No one has arrived at equity nirvana, so we need to see each other's humanity and meet people where they are if we want to build the common ground we need for lasting change.



**Alsharhan:** I recommend that funders live in the space of experimentation and exploration as a daily norm. Funders should work in concert with grantees and community members on testing out new approaches

**"Funders should work in concert with grantees and community members on testing out new approaches and iterate on those new approaches with feedback from those most impacted by the work." —Jaser Alsharhan**

and iterate on those new approaches with feedback from those most impacted by the work. Ask, "Do you want us to play the role of an ally? What would that look like for you?" If an approach is not working—and you know that truth from those most impacted—you can move on to the next experiment.

**Faithful:** Self reflection, study, and action are not in tension with one another—self reflection and study must serve as anchors to your action. They inform action so that it is more powerful. It is helpful to view self reflection, study, and action as complete parts of allyship because they are needed to be a reliable ally. Many Black people, especially those who struggle for racial justice, have been negatively impacted by allies who didn't have enough information or acted too fast. On one side, Black justice workers are put at risk by allies who take urgent action without a clear sense of their position or context, especially in high-stake moments. On the other side, they are made vulnerable if they are relying on action, and allies' paralysis render them unable to act, especially when their action is needed most. Perhaps right now, our most critical discernment is knowing when to be still, and when to move. Regardless, allies will still need to understand the moment we are in, and who they are, to be effective.

**Gonzales:** Any funder that wants to embark on the journey of allyship needs to be prepared to be uncomfortable and educate themselves on systems of oppression. For leaders, this requires surrendering all preconceived notions they have about your organization, themselves, and others.



**"Any funder that wants to embark on the journey of allyship needs to be prepared to be uncomfortable and educate themselves on systems of oppression. For leaders, this requires surrendering all preconceived notions they have about your organization, themselves, and others."**

**—Rachel Gonzales**

This will ultimately allow for greater learning, understanding, and resistance to oppressive structures. Many funders also need to build capacity to accept criticism and the gift it offers to do and be better. Being a performative ally helps no one and leads to perpetuating oppression.

Every well-meaning organization thinks they are doing it right and that they could not possibly be doing anything to harm the marginalized communities they seek to serve. Injustice and inequity can be insidious and show up in ways you haven't imagined or even realized. Approaching this work from a place of surrender and genuine empathy will help build trust and will allow you to use the power and privilege you possess for good.

**Andersen:** Starting anything can seem daunting, especially if you don't know where to start. My advice to funders starting on this journey is to seek out knowledge and partnerships. One of the best ways to do this is to reach out to your colleagues in the philanthropic community who are doing this work. That could mean starting a discussion thread in CONNECT to ask for advice or being proactive and engaging with resources organizations like PEAK have available, such as chapter meetings or affinity groups. Taking the time to prioritize this journey is key, as is a commitment to transparency and growth.

## How can you build a culture of equity and allyship from wherever you sit within an organization?

**Faithful:** Allyship is so powerful because it does not depend on those with institutional power, and, in fact, allyship assumes that power is contested and is an effort to build power through association. Therefore, allyship must be present in as many places as possible. It is critical for every person to identify and leverage the power that is available through your identity, in your position, with the everyday self-determination that you are afforded. These micro-contributions, along with the work of modeling allyship, reshapes culture and powers our collective self-determination to change.



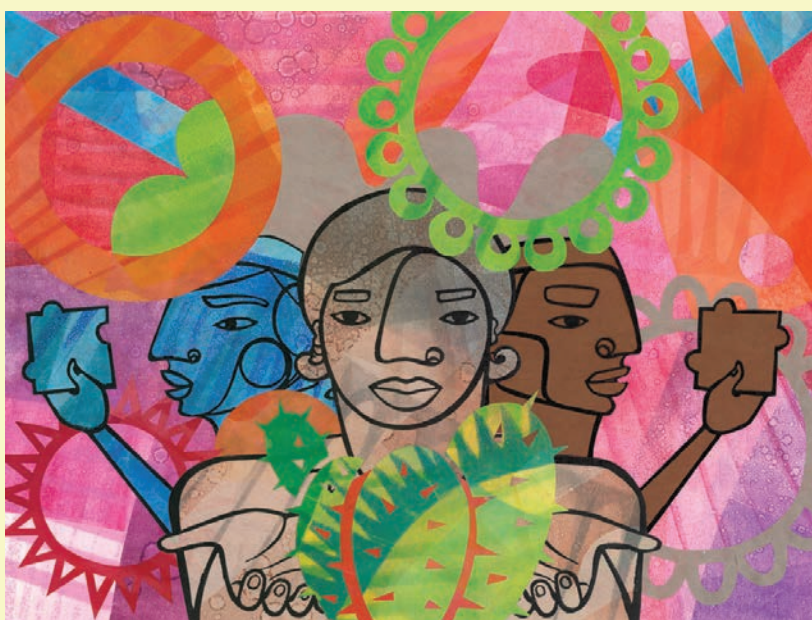
When strong allyship is practiced in little ways, we shift. So it is important we value what we can do, and do it.

**“When strong allyship is practiced in little ways, we shift. So it is important we value what we can do, and do it.”**

**—Richael Faithful**

**Marshall:** Peer-to-peer relationships and learning spaces are where I find my support. So for those who are isolated in their positions, create that time to talk to other folks to know that you're not alone and get different ideas.

**Andersen:** Driving a more equitable culture is a journey that requires openness and self-reflection, as well as a willingness to learn and take action both individually and collectively. Start by making a commitment to yourself and to your colleagues. Offer to set up a space where your colleagues can meet and discuss their thoughts and ideas, or set up an anonymous survey to ensure all voices are included in the process of gathering thoughts and implementing changes. Acknowledge if you are in a privileged position and need to get comfortable with being uncomfortable to learn and grow. Pay attention to the language you use and encourage participation in meetings from those who are not normally given a chance to use their voice. Set up informal check-ins to keep you and your colleagues accountable. Accountability is key to success.



### **Favianna Rodriguez, An Invitation EV 7/10**

In addition to her art, Favianna Rodriguez is deeply engaged in writing, cultural organizing, and power building. In this image, the seventh in a series of ten, three people are building relationships with each other and collaborating to transform their future. Each person is holding an individual piece of a puzzle. Each figure is focused on a separate, yet complementary pathway toward a shared goal. “Each piece in the edition is both a destruction and a reimagining of its original composition. I reorganized, ripped, dissected, and dramatically recomposed the figures in the piece, as a metaphor for challenging our own assumptions about what constitutes ‘social justice art.’”

*Favianna Rodriguez (favianna.com)*



**“Accountability is the key to success.”**

**—Kelsey Andersen**

**Gonzales:** Develop an awareness of where unconscious bias occurs and provide teams with the tools to manage bias and create more inclusivity. Create a culture of humility within your organization so that there is a safe space to learn about cultural differences without judgement and an opportunity to embrace other people’s experiences and realities.

**Morgan:** Grants managers have tremendous influence over the grantmaking process. How can you use that influence to support decision-making that will advance racial equity? At our foundations, we work hard to be accessible to grantees. We take calls, customize every email, and when we decline a request, we not only provide specific feedback about why the request was not a fit, but offer guidance about what would be a fit. I ask someone new to test drive our online application every year to make sure our systems aren’t presenting unnecessary barriers to funding. We’re trying to be intentional about selecting vendors and hiring staff from a diverse pool of candidates by recruiting outside our usual networks. And we recently completed an equity audit of past giving to establish a baseline from which we can measure progress.

### How can white leaders of diverse teams best show up and advocate for their staff?

**Alsharhan:** Prior to committing to specific action steps, white leaders can show up by reflecting on the ways in which they have potentially put their own concerns, points of view, and needs ahead of their staff’s. Leaders can then start to position those thoughts, beliefs, and motivations second to those of their staff, especially when thinking about their role as an advocate for change. We need white leaders who can truly listen to the needs of their diverse staff, who cocreate innovative solutions alongside their teams, and, ultimately, who fight for organizational shifts that would affect the team collectively rather than fighting for an individual need. This obviously takes a great deal of distancing from the leader’s ego but can result in a tangible way to operationalize a commitment to equity and consistent power analysis.

**Morgan:** Recognize that it’s not always easy for people to speak up. Check in with those who are quiet, build in round-robin sharing so you’re not singling people out, and make time for connections to strengthen the relationships that our work depends on. Show up for staff with your voice, your honesty, and your courage to be vulnerable and question the status quo. I believe silence is a legacy of racism—the quiet assent to shrugging off responsibility for a system that insists you pull yourself up by your bootstraps when the bootstraps are broken. Let’s listen to each other, let’s speak up for each other, and let’s move forward together.



**“Show up for staff with your voice, your honesty, and your courage to be vulnerable and question the status quo.”**

**—Jenny Zhang Morgan**

**Gonzales:** It can be exhausting and lonely to be the only person of a diverse background on a team, and they may be showing up to work differently to appease the dominant culture rather than showing up as their authentic selves like they do at home. Diverse team members have developed conscious and unconscious coping mechanisms to get by in a world that has often marginalized them. White leaders need to approach advocating for their diverse teams with this in mind. Building a culture of humility within the team will create space for curiosity and learning about each other which will help uncover some of the nuances so that the white leader is able to adjust approaches and fill gaps. Leaders need to make space for each team member to safely show up as their authentic selves and listen to understand so that they can build trust among team members, retain diverse talent, and achieve and surpass business goals.

**While grants management professionals wield privilege and power over grantees, they have historically experienced power imbalances internally within their institutions. What can program officers and organization leaders do to act in truer partnership and allyship with grants managers?**

**Marshall:** I'd recommend grants management professionals really utilize PEAK's Grants Management Professional Competency Model. Program officers have a tendency to think about what's right in front of them and how to do it right now. So when we look at a specific issue or a problem, we only discuss that one issue or problem. We don't look at it in the larger context of the entire grant cycle. I took the competency model and used it to discuss timing and worked backward on an idea with the programs team. Program officers can think about not just the grant at the moment, but across the whole grant cycle, and what departments need to be involved. The competency model then trains the program officers to see



each and every thing that everybody else has to do. Not everybody knows what everybody else does and what their workflows are. Create spaces for team members to more deeply understand the other departments and their ebbs and flows of workflows.

**“Create spaces for team members to more deeply understand the other departments and their ebbs and flows of workflows.”**

**—Jody Marshall**

## Connect with PEAK peers to develop your allyship practice

**Want to dig deeper into your own allyship practice? Join one of these communities cocreated by PEAK and a cadre of volunteers.**

Our **Accountability and Action for Allies Caucus**, open to all members, is dedicated to learning to be better allies to marginalized populations.

Our **DEI Learning and Support Community of Practice**, open to Organization Members, is dedicated on advancing knowledge about racial equity, diversity, inclusion, and justice frameworks to drive change in grantmaking practice and culture. ▲



### **Mer Young, *Solidarity***

For Indigenous Peoples' Day, nonprofits Amplifier, Nia Tero, and IllumiNative teamed up to launch a large-scale public art campaign to elevate Indigenous land stewardship and celebrate the vital relationship between Indigenous sovereignty and Black liberation. *Solidarity* is one in a series created by Indigenous artist Mer Young, a Tongva (Long Beach) Descendant of the Chichimeca and Mescalero-Chiricahua Apache Tribe, who aims to inspire, celebrate, and elevate repressed indigenous, First Nations and native cultures, and women of color.

Mer Young ([meryoung.com](http://meryoung.com)) for [amplifier.org](http://amplifier.org)

# PEAK Community



## Welcome to PEAK Year 26

As we embark on our next chapter as an organization, we begin by extending our gratitude to the PEAK community for coming together in remarkable ways in 2021. Cheers for participating in our virtual gatherings, taking on volunteer roles, leaning into difficult conversations, seizing opportunities to champion equity, and finding the deep value and joy of community.

Through PEAK's 14 chapters, the CONNECT online forum, PEAK2021 Online, our Grants Management 101 cohorts, affinity groups, and communities of practice, our membership continues to grow (now approaching 7,000 people) and be more engaged than ever in learning and evolving together to transform philanthropy.

**Read on to explore the latest news, starting with a look back at our 25th anniversary campaign, featuring reflections from members of our community.**

**Guided by our 25th anniversary committee, informed by focus groups and interviews with founding members, and thanks to member and partner submissions of videos, images, documents, and stories, we were able to delve deep into PEAK's rich history in 2021. The results: an anniversary website rich with multimedia storytelling about our first 25 years. More than an archive for our organization, we now have a living history portal to document PEAK's evolution and chart our progress in transforming philanthropy.**

Across three milestone events, we reflected on how much grants management has evolved and how far our organization has come. Colleagues and partners from around the sector helped us to recognize our accomplishments and identify the priorities for our next chapter. We kicked off in April at our annual meeting where we unveiled our refreshed vision, mission, and purpose and a new strategic framework to guide our work in the years ahead. We also unveiled a new visual identity, highlighted how PEAK has grown and continues to diffuse knowledge through the sector, and explored the strategic framework that will guide us in the years to come.

Last September, hundreds of individuals from across the sector joined us for a dynamic CEO panel conversation with PEAK's **Satonya Fair**, Kresge Foundation's **Rip Rapson**, Ford Foundation's **Darren Walker**, and GEO's **Marcus Walton** to explore the role of grants professionals in operationalizing equity.

An early December celebration of community brought us together for some joy, self-care, and holiday season togetherness. We lauded members and volunteers, heard about aspirations for the future from peers in our membership, and enjoyed a fun networking happy hour.

**"We look forward to 25 years of you challenging us to be more equitable, more inclusive, and just to be better as a field in working with our grantee partners."**

**—Sherece West-Scantlebury, CEO, Winthrop Rockefeller Foundation**



**"Grants management professionals are the interface that most of us have with community and with community residents. We would be wasting a huge resource and asset were we not to call on their perspective, their expertise, and insight to help figure out how we shift as the times shift."**

**—Rip Rapson, President and CEO, The Kresge Foundation**



**"Grants managers have been reservoirs of information that haven't always been appreciated and leveraged for what they can do to bring superpowers to grantmaking's ultimate impact."**

**—Darren Walker, President, Ford Foundation**



**"PEAK has given me the greatest gift of really understanding in a whole new way how deep service can be in our beings."**

**—Margaret Egan, Egan Consulting and PEAK Cofounder**



## #PEAKis25

Through a yearlong storytelling project, members and partners collaborated with us on a series of videos and stories, sharing their experiences of being a part of this community, what PEAK has meant to them, how the profession of grants management has expanded over the years, and their aspirations for the future of philanthropy and how our community can lead as changemakers.

Our growing story collection spotlights the history of PEAK's annual conference, Project Streamline, the development and evolution of grants management systems, the growth and leadership of our chapters, our members' career journeys, the *Journal*, and more.



**"Even if you're not the leader, you can still lead. You see where there needs to be change within your organization: Speak up!"**

—Ursula Stewart, PEAK Cofounder and Salesforce.org Grantmaking and Program Management Industry Advisor

**"PEAK starts as a place of refuge. You need some place where you're understood. If you really use those tools, you can make a lot of change, not only in your organization, but everywhere."**

—Suki O'Kane, Director of Administration, Walter & Elise Haas Fund



**"Now is the time for philanthropy to double its efforts on racial equity and fund it in that spirit of care."**

—Roland Kennedy, Jr., Director of Grants Management, Carnegie Corporation of New York

**"Congratulations to PEAK on 25 remarkable years of transforming philanthropy and advancing equitable, effective grantmaking practices."**

—Robert Bank, CEO, American Jewish World Service



**"As we celebrate PEAK's anniversary, I'm reminded of the author Ralph Ellison who wrote, 'the world is a possibility if only you discover it.' At this 25-year mark, our membership has indeed discovered the possibilities; here's to 25 more years of greatness."**

—Genise Singleton, Director of Grants Management, The Kresge Foundation

# Thank you for helping to make our 25th celebration shine so bright!

We offer deep appreciation to our 25th Anniversary Committee members, led by cochairs **Rebecca Van Sickle**, managing partner, 1892 consulting, and **Genise Singleton**, director of grants management, The Kresge Foundation. Thank you also to our sponsors for the generous support.

Explore PEAK's continuing history in the making at [peakgrantmaking.org/25years](https://peakgrantmaking.org/25years).

## GOVERNANCE



### 2022 Board of Directors Elections

PEAK's board of directors approved the nomination of three candidates for the 2022–25 term: (from left to right) JPMorgan Chase Executive Director, Global Philanthropy **Elsa Chin**; Episcopal Health Foundation Chief of Staff **Eusebio Diaz**; and Margaret A. Cargill Philanthropies Director of Program Operations **Ify Mora**. Diaz was selected by the nominating committee in 2020 and deferred his board service one year. Chin and Mora are both pursuing a second term.

Vote in our online election to confirm these candidates. Also, plan to attend our virtual annual membership meeting, which will feature updates from PEAK's board and staff, information on how to get involved with our community, build your expertise, connect with peers, and elevate your grantmaking practice.

We extend our special thanks to outgoing board member **Kerri Hurley** (above right), who is the director of grants management at the Barr Foundation! We deeply appreciate her service, leadership, and partnership over the past six years.

## GIVING TUESDAY

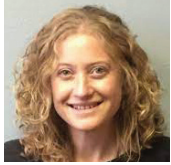
For our first-ever Giving Tuesday campaign, PEAK board members showed some love with a spirited set of portraits and a special video featuring their hand-hearts, which we debuted at our 25th anniversary celebration in December. Our campaign spurred an outpouring of community engagement on social media with warm comments and some generous personal gifts.

Contribute to PEAK at [peakgrantmaking.org/donate](https://peakgrantmaking.org/donate).



## COMMUNITY NEWS

PEAK Accountability and Action for Allies Caucus Cochair **Kelsey Andersen** has been promoted to assistant vice president, grants associate, community investing and development at Citi Foundation.



**Carla Batts**, PEAK Florida's membership cochair, has been promoted to grants administration manager at Allegany Franciscan Ministries.

**Kevin Bolduc**, a PEAK board member, is celebrating 20 years at the Center for Effective Philanthropy.

**Annie Brinkman** has joined Crown Family Philanthropies as grants manager.

**Heather Chappell** of the Walton Family Foundation was promoted to communications officer, brand and executive.

**Tracy Chen** has joined 1892 consulting as its grantmaking systems analyst.

**Stephanie Chill** joined Florida Humanities as grants coordinator.

**Kelly Clardy** was promoted to grants manager at Maddie's Fund.

**Lisa Colaninno**, PEAK New England's chair and chapter volunteer for over ten years, retired from Travelers.

**Sara Davis**, a former PEAK board member, has joined Hillspire as senior director, grants and philanthropic services.

**Gina Del Castillo** has been promoted to community engagement officer at NextFifty Initiative.

**Asialee Drews** has joined The Colorado Trust as grants management specialist.



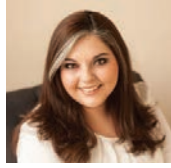
**Stephanie Duffy**, a PEAK board alumna and former Minnesota chapter volunteer, is celebrating 25 years at McKnight Foundation.

**Tiffany Duffy**, PEAK Midwest's membership cochair, started a new role as grants manager at Crown Family Philanthropies.

AAPI Affinity Group cochair and PEAK 25th Anniversary Committee member **Jina Song Freiberg** started a new role as senior grants manager at Katz Amsterdam Foundation.

**Whitney Gerlach** has joined Pacific Hospital Preservation & Development Authority as its office coordinator.

**Rachel Gonzales**, program director at the Animal Assistance Foundation, PEAK Rocky Mountain chapter volunteer, and PEAK Latinx Caucus cochair, completed a fellowship with the Latino Leadership Institute.



**Sarah Grady** started as the grants manager at the Patrick J. McGovern Foundation.

Former PEAK Corporate Advisory Council member **Heidi Jedlicka Halvarson** was promoted to philanthropy program manager at Medtronic Foundation.

**Karen Herrera** of The J. Paul Getty Trust, **Lucy Hollis** of Smile Train, **Erin Peterson** of The Klarman Family Foundation, **Lynne Wiora** of The Joyce Foundation, and **Allison Wojtowicz** of the MacArthur Foundation were selected to join the Technology Association of Grantmakers' Emerging Leaders in Philanthropy Tech 2022 Cohort.

**Andie Hession** joined the Endowment for Health as a grants program associate.

Rotary Charities of Traverse City welcomed **Kristin Hettich** as its director of community development and **Kendra Luta** as its programs associate.



PEAK Small Foundations Affinity Group Cochair **Traci Johnson** from POISE Foundation, was nominated

for Exponent Philanthropy's 2021 Outsized Impact Award.

**Roland Kennedy, Jr.**, who served on the PEAK 25th Anniversary Committee, is now director of grants management at Carnegie Corporation of New York.

**Sydney Langer** has been promoted to program officer at NextFifty Initiative.

**Jill Minogue** was promoted to systems administrator at The Simons Foundation.

The Community Benefit Giving Office at Cedars-Sinai hired **Qiana Montazeri** and **Jennifer Pio** to join their team as, respectively, associate program officer and grants manager.

PEAK Northern California Vice Chair **Daniel Oviedo** started as grants associate at the Stupski Foundation.

**Winifred Olliff** started a new role as director of operations at Borealis Philanthropy.

The Klarman Foundation promoted former PEAK New England volunteer **Erin Peterson** to director,

grantmaking operations and information technology.

**Liz Player** was promoted to grants manager for civic engagement and government at Ford Foundation.

PEAK Southern California Program Cochair **Sarina Raby** was promoted to grants manager at the Jewish Community Foundation Los Angeles.



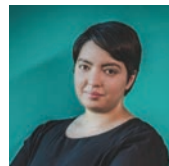
**Iracel Rivero** has joined Ford Foundation as grants manager.

**Ricshawn Adkins Roane** is now the executive director of the Weissberg Foundation.

**Katie Ratkowski** joined St. Louis City Senior Fund as its business and grants manager.

**Isabel Sousa-Rodriguez** from the Edward W. Hazen Foundation has joined the board of Borealis Philanthropy.

**Sakura Takano** was promoted to CEO at Rotary Charities of Traverse City.



**Roselle Tenorio**, who currently serves as a PEAK Southwest volunteer, has joined

Evangelical Lutheran Church in America as its domestic grants manager.

**Gwyneth Tripp** was promoted to director of grantmaking practice at the Stupski Foundation.

**Zunairis Velazquez** joined The Simons Foundation as a grants assistant.

**Bria Ward** has joined Next Fifty Initiative as its director of people and culture.

**Laura Jean Watters** has been promoted to executive director of The Staten Island Foundation.

**Devona Williams** was promoted to controller at the Stupski Foundation.

PEAK2022 Conference Cochair **Richard Winton** joined The Kresge Foundation as its grants management associate.



**Gene Yoon** has been promoted to communications manager at Pacific Hospital Preservation & Development Authority.

**TeQuion Brookins** will be transitioning from her role at the McGregor Fund to working full-time with her business consulting and fintech firm, TeQuionBrookins.com.

Send your news for the next edition to [info@peakgrantmaking.org](mailto:info@peakgrantmaking.org).

## Welcome, New Organization Members

Airbnb.org

AJB Consulting\*

American Nurses Foundation

Ausherman Family Foundation

Bermuda Community Foundation

Charles & Margery Barancik Foundation

Community Foundation for Palm Beach and Martin Counties

David Rockefeller Fund

Delaware Community Foundation

Don Wood Foundation

Dorothy A. Johnson Center for Philanthropy

Elbow Fund

Exponent Partners\*

Gulf Research Program at the National Academy of Sciences, Engineering, and Medicine

Maine Philanthropy Center

Montalvo Consulting\*

Moore Impact\*

Mother Cabrini Health Foundation

Park Foundation

The Pew Charitable Trusts

Philanos

Pivotal Ventures

POISE Foundation

Pottawattamie County Community Foundation

The San Diego Foundation

Sensible FMS\*

Support Our Aging Religious Tides

United Way of Greater Atlanta

Verdant Health Commission

Western Colorado Community Foundation

Woods Fund of Chicago

\*Consultant Members

## NEW RESOURCES

### Driving Equity With Demographic Data

The latest release in PEAK's suite of resources supporting the Drive Equity Principle for Peak Grantmaking explores the intricacies of demographic data collection. For philanthropy professionals, data can illuminate the impact of your grants, but working with the information you collect also comes with complex challenges.

This action planner—open to the public—is designed to help staff and leaders at funding organizations work through some of the fundamental questions that you will need to address by offering an overview of four action steps that you can take now to drive equity through your data-collection practices:

- Understand the Power of Equitable Data Collection Practices
- Decide on a Demographic Data Taxonomy
- Navigate the Legal and Privacy Landscape Surrounding Demographic Data
- Communicate Effectively About Your Demographic Data

Coming in early 2022: Each action step will be the subject of a detailed how-to guide available to PEAK's Organization and Consultant Members.

**Download the action planner and more from our growing suite of Drive Equity resources at [peakgrantmaking.org/drive-equity](https://peakgrantmaking.org/drive-equity).**



## LEARNING COHORTS

### Grants Management 101: Our 2021 virtual cohorts

PEAK's signature course, Grants Management 101, engaged 162 participants across two cohorts in 2021. The seven-session series provided opportunities to engage with colleagues on a variety of topics, including understanding and assessing nonprofit financials, mapping career development and progression, developing skills for tactical grantmaking, and implementing strategic equitable grantmaking practices. We'd like to extend our deepest thanks to guest speakers **Amy Coates Madsen**, Maryland Nonprofits; **Jennifer Pedroni**, BDO FMA; **Kristen Summers**, Saint Luke's Foundation; and **Tara Havlicek**, Mitsubishi Electric America Foundation.

**Learn more at [peakgrantmaking.org/GM101](https://peakgrantmaking.org/GM101).**

## Volunteer at PEAK!

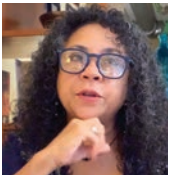
As a member-led, member-driven organization, we live our values by providing more than 300 opportunities each year for members and partners to contribute as volunteers—helping to build our collective expertise in implementing effective, equitable grantmaking practices. Grow your network, develop skills and knowledge, and help create and drive strategic change that strengthens PEAK, our community, and the sector.

**Explore current volunteer opportunities at [peakgrantmaking.org/volunteer-board](https://peakgrantmaking.org/volunteer-board).**

## AROUND THE CHAPTERS

Deepening peer connections, exploring critical topics, and emergent learning were throughlines for many of PEAK's chapters in 2021. As we continue to work within a virtual landscape, chapters are utilizing virtual platforms to provide more flexible and inclusive programming. And they are not shying away from facilitating difficult conversations, either. Instead, they have approached them with care and nuance. Case in point: demographic data has been one of the most explored topics this year with five chapters hosting events centered on making the case for collecting and using it as an equitable practice to improve grantmaking.

—Altinay Cortes, Chapter Manager



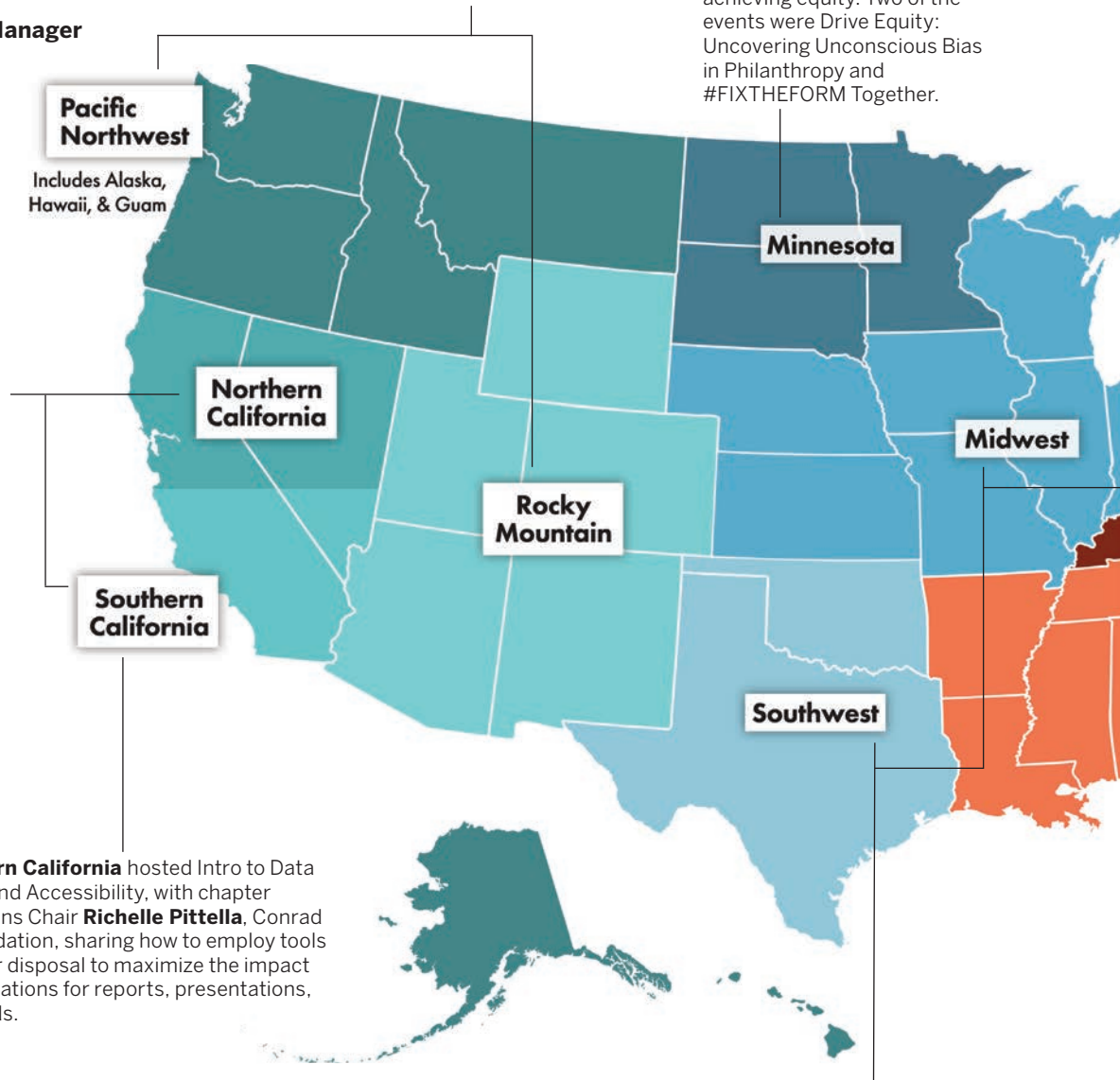
PEAK Northern California and PEAK Southern California led a panel where The California Endowment, The James Irvine Foundation, and Weingart Foundation discussed their collaborative project working toward developing a shared approach for gathering and reporting on demographic data on the boards, staff, and constituents of their partner organizations. Kelly Brown from Viewpoint Consulting is helping to lead the work and joined the panel to talk about her role in meeting the project's goals.



PEAK Southern California hosted Intro to Data Visualization and Accessibility, with chapter Communications Chair Richelle Pittella, Conrad N. Hilton Foundation, sharing how to employ tools already at their disposal to maximize the impact of data visualizations for reports, presentations, and dashboards.

PEAK Pacific Northwest and PEAK Rocky Mountain continued to lean into deepening their regional communities by hosting monthly coffee hours. They explored topics such as oral reporting, reducing bias in grantmaking, and collecting and using demographic data.

PEAK Minnesota honed in on advancing equitable practices by hosting events designed to help participants understand how their grantmaking practices support or hinder achieving equity. Two of the events were Drive Equity: Uncovering Unconscious Bias in Philanthropy and #FIXTHEFORM Together.



PEAK Southwest, PEAK Mideast and PEAK Midwest had the largest chapter collaboration to date when they cohosted an engaging networking session at PEAK2021. As they plan for 2022, PEAK Southwest is getting creative with their leadership structure by introducing a committee model that allows for more flexible volunteer roles and responsibilities.

## 2021 Leadership Summit: Supporting our volunteers

We say it often: PEAK is member-driven and member-led, and we are lucky to have the best member volunteers leading our chapters and peer communities—not to mention participating in our pilot mentoring program! During the 2021 Leadership Summit, we had the honor of bringing together 130 of these leaders to invest in their leadership development and create a supportive, cohesive network dedicated to emergent learning within our volunteer community.



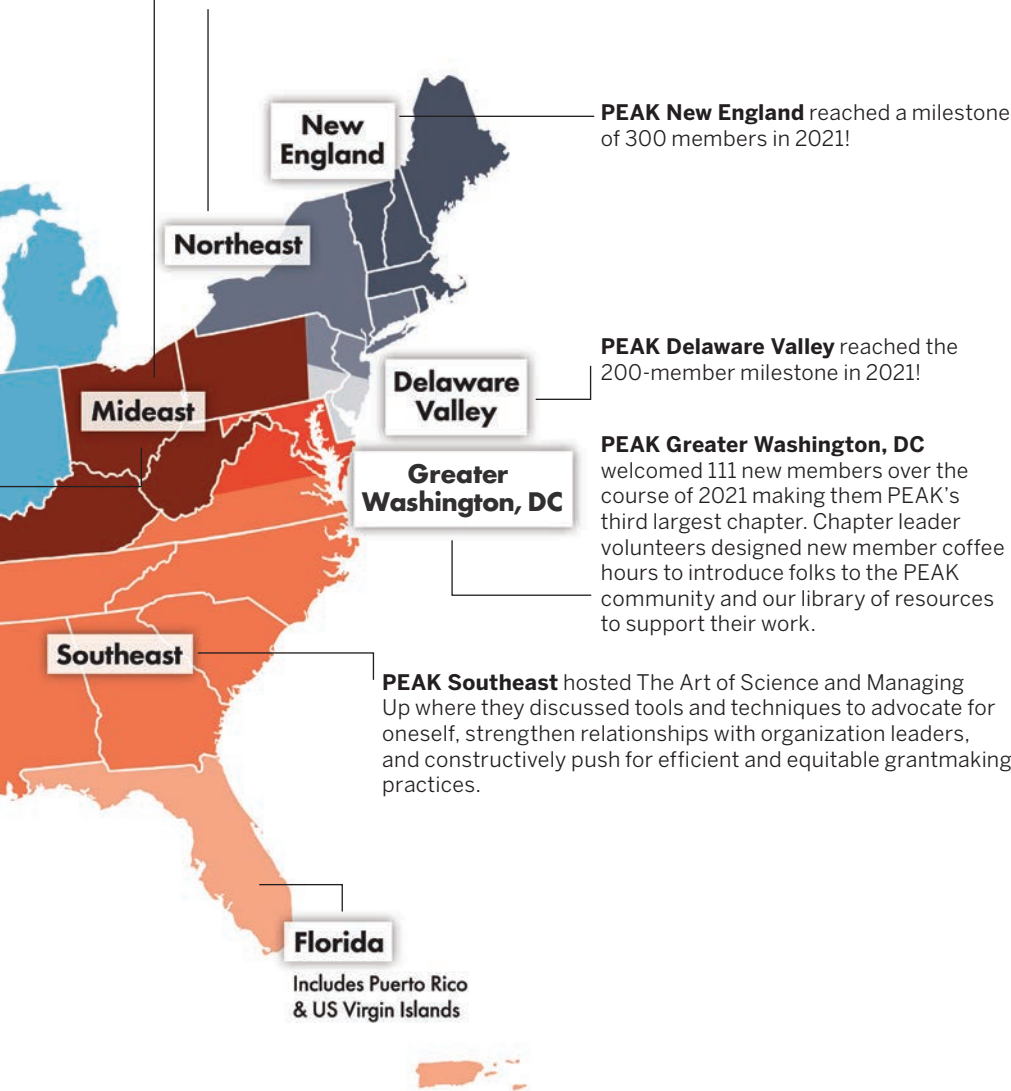
We were joined by **Aiko Bethea**, former PEAK board member and founder of RARE Coaching & Consulting, who inspired volunteers to live BIG—set boundaries, live with integrity, and lead with generosity. In addition, **Marissa Lifshen Steinberger**, founder of One Eleven Leadership, shared effective practices to promote self-care while being a change agent.

We'd like to extend our special thanks to our volunteer planning team members: **Fernanda Kuchkarian, Jennifer Katell, Judith Hill, Kim Canfield, Kristopher LeCorgne, and Traci Johnson**, as well as to PEAK board members **Kerri Hurley, Josh Abel, and Janet Disla**, all of whom joined us at this event.



**PEAK Mideast** wins best webinar title of 2021 with *Constructive Conflict: Unlock Your Jedi Skills to Deal with Drama*. The session, led by Maribeth Saleem-Tanner of Community Food Initiatives, focused on how to productively engage in difficult conversations in the workplace.

**PEAK Northeast** teamed up with Philanthropy New York for *Equity and Evaluation: Can We Embrace Both in Collecting Demographic Data?*, a lively panel where participants dove deep into best practices and how to balance funder and grantee needs.



**PEAK Florida** is working to build stronger support for often marginalized populations by hosting *Overlooked, Underserved, and Missing: How to Mainstream LGBTQ Funding and Increase Equitable Giving*. They led a panel of Equality Florida staff and funders to discuss solutions, tools, and best grantmaking practices and policies that minimize bias, promote inclusion, and increase LGBTQ equitable giving within institutions.

## PEER GROUPS

In 2020, as the country was undergoing the racial justice reckoning after the murder of George Floyd, the PEAK community came together to consider how best to meet the moment. After brainstorming with member volunteers, 11 peer communities were launched over the course of 2021. Each group is volunteer-led with staff support and meets regularly, with cadence varying from monthly meetings to biannual events. Thank you to the corps of volunteer leaders who are cochairing each of these groups.

Learn about how to join PEAK's peer communities at [peakgrantmaking.org/peer-groups](https://peakgrantmaking.org/peer-groups).



Image credits (left to right): Getty Images/iStockphoto, Rosalia Torres-Weiner/Collection of Anacostia Community Museum, Smithsonian Institution, Jamie Chin.

## PEAK's Affinity Groups and Caucuses

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

The **Asian American and Pacific Islander Caucus** has grown and its members have connected through informal virtual happy hours and quarterly meetings, including discussions about AAPI funding and managing burnout. The cochairs recommended books, podcasts, and other media in the article "Celebrating AAPI Heritage Month" to promote greater understanding and appreciation of the community.

The **Black Caucus** has had a great time networking together. They hosted a session on mental health and self care for Black philanthropy professionals, with a social work professional, Marvin Toliver, LCSW, of Melanted Social Work. They have also hosted several networking sessions to connect with each other and discuss career aspirations.

The **Latinx Caucus** hosts quarterly *cafecito* hours. These *cafecitos* center community building and have included networking opportunities and riveting conversations on the intersections of identity and culture and how they are embraced or rebuffed in the philanthropic sector. Several group leaders shared some tidbits from these conversations in the article "Through the Latinx Caucus, Grants Professionals Find Common Bonds Amid Diverse Experiences."



## PEAK's Communities of Practice and Working Groups

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

The **DEI Learning and Support Community** hosts interactive conversations centered on improving practices like collecting demographic data. The presentation *Start Where you Stand and Start Where you Can* highlighted how one foundation has leveraged partnerships and capacity building in order to amplify voices of communities of color in their state and advance equity.

The **Equitable Grantmaking Practices Community** has been busy with engaging sessions on participatory grantmaking and alternative reporting methods using case-study experiences from members. A benchmarking survey was developed and completed by members to assess where they are collectively in terms of implementing equitable grantmaking practices. This survey will be used to measure growth towards more equitable practices. Members held a conversation on the survey findings and areas to explore further.

The **Tech and Data Futurists Community** has been exploring data management and technology systems to support more efficient grantmaking. They conducted a peer share session on different technology resources that members use in their grantmaking. They also held a marquee session to learn about good data management practices.

The **Oral and Alternative Reporting Working Group**, formed from a CONNECT discussion thread, has been meeting to hear case studies from organizations that are utilizing alternative reporting processes, from focus groups, oral reporting, or eliminating reporting. Members have shared how they have shifted their practices. Conversations and connections have continued on a designated Slack channel.

The **Impact Assessment Tool Working Group** formed from a CONNECT discussion thread, has met to discuss and assess different impact assessment tools. They are collectively working to review demos of different tool options, and connect with members whose organizations are already using the tools. Conversations and connections have continued on a designated Slack channel.

The **Accountability and Action for Allies Caucus** hosted virtual gatherings every six weeks. Participants considered and created personal goals to act as allies and to have a consistent touchpoint on progress to stay accountable to themselves and one another. In 2022, the group is planning to host a book club and create a library of shared resources.

The **Corporate Grantmakers Affinity Group** most recently met to talk about social impact technology and share their experiences. For 2022, the group will establish a meeting cadence and continue to support their corporate grantmaking peers.

The **Small Foundations Affinity Group** hosts coffee hours that center varying topics identified early on by the affinity group members. The coffee hours are part presentation and part discussion which provide an opportunity for peer learning. Coffee hour topics have included reporting and policies and procedures manuals.

In December 2021, we launched the **Intermediaries Affinity Group** to offer a community to network, learn together, and problem solve on common challenges and opportunities—like working as both a grantmaker and grantseeker, fiscal sponsorships, and expenditure responsibility—to name a few.



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

## ANNUAL CONFERENCE

This March, **we're bringing our community together** for a weeklong virtual conference centering on what it looks like to "live your PEAK." Together, we'll imagine how grantmaking can truly embody what PEAK stands for: Principles, Equity, Advocacy, and Knowledge. **Taking inspiration** from thought-provoking keynotes, interactive peer dialogues, skill-building breakouts, and networking gatherings, the PEAK2022 experience will leave you empowered to lead change in your organization and the sector at large. Plus, we'll be **celebrating the great city of New Orleans** by infusing the experience with a NOLA vibe!

Register now at [peakgrantmaking.org/peak2022online](https://peakgrantmaking.org/peak2022online)

A bronze statue of three men playing trumpets, set against a background of autumn foliage. The statue is the focal point of the lower half of the page.

**PEAK**  
**ONLINE**  
**2022**

**March 21-25**

**#PEAK2022online**