

PEAK Grantmaking Grants Professionals Competency Model

The landscape of philanthropy has undergone a profound transformation since the first iteration of PEAK's *Grants Professionals Competency Model* was released seven years ago.

Technological advancements have revolutionized how funders operate, especially in leveraging data and technology to rapidly respond to community needs, track progress, and share their learnings with others. More funders have shifted how they advance equity and inclusion in their nonprofit and community partnerships by streamlining their processes to reduce burdens on community partners. Many are addressing bias in their grantmaking strategies and processes and are more intentionally engaging community partners in their work. However, there is still much work to be done in pursuit of principled grantmaking practices that align funders and nonprofits as equal partners.

And our community of grants professionals—now more than 8,000 strong—continues to lead the way in advancing this work. At PEAK2024, we asked attendees to share which competencies are most important to being a successful grants professional and to identify any competencies our first model was missing. Convening attendees noted the importance of centering people—internally and externally—and communities in the work and in creating bridges between different stakeholder groups. Facilitation skills, change management leadership skills, coaching, emergent learning, and radical accountability were also noted as key elements to being a successful grants professional. Technical skills related to data integrity, use, and accessibility and communications were also uplifted. Many attendees also highlighted the importance of having knowledge, curiosity, and skills related to diversity, equity, and inclusion.

Drawing on these insights along with competency research and PEAK staff's firsthand knowledge, we developed this revision to PEAK's *Competency Model*. Just as the first edition resulted from the efforts of PEAK staff and community volunteers, we appreciate everyone's contributions to help us carry this work forward, and we trust that you will see your input reflected in this updated resource.

About PEAK Grantmaking

PEAK Grantmaking is a national nonprofit organization of more than 500 contributing institutions and 8,000 grants professionals leading the way in advancing equitable, effective grantmaking practices. Together, we are transforming philanthropy. To learn more about PEAK and its vibrant community of members who come together as emergent learners to drive change, visit peakgrantmaking.org.

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Considering these dynamic changes in the field, we have evolved PEAK's *Competency Model* to reflect the continuously expanding needs and expectations of today's grants professionals. Regardless of your role or title—be it grants manager, program officer, or data specialist—or your organization's type or size, this comprehensive framework centers on ten competencies and outlines the essential knowledge, skills, and understanding required for effective, equity-centered grantmaking practices.

The competencies apply to everyone who has grants management as part of their role, from grants managers to organizational teams to leaders in charge of strategic planning processes. Identifying both the skills and knowledge needed for success in different contexts at every level provides a highly detailed guide for the profession. Although individual grants professionals may weigh the importance of each competency differently in their day-to-day work given their job title or function, all the competencies outlined here remain the most critical competencies for success.

And by developing these competencies, grants professionals position themselves to play a pivotal role in driving organizational success and shaping a more equitable future for philanthropy. With that in mind, know that this is a living and evolving model that will be updated as needed to reflect changes in the field.

What's Changed?

To better reflect the diverse roles of PEAK members, we've changed the name of the resource from the *Grants Management Professional Competency Model* to the *Grants Professionals Competency Model*. This broader title recognizes that while not all members have *grants management* in their professional titles, their work is essential to successful grants management. Readers familiar with the first edition of PEAK's *Competency Model* will note significant changes in the change management leadership, data and technology, and knowledge management areas, as well as the new competency area—collaboration—highlighting the importance of teamwork and partnership in achieving organizational goals.

In addition, the section of the original *Competency Model* that focused on the different levels of responsibilities grants professionals hold during the various phases of the grant lifecycle has been removed and will be incorporated in PEAK's refreshed resources focusing on staffing the grants management function for success and next-level practices in grantmaking, coming out in 2025.

How to Use PEAK's Competency Model

Each of the ten competencies are followed by two sections. The **Demonstrating Expertise** section outlines the many ways in which grants professionals can actively inform and guide the organization's work while the **Essential Knowledge** section outlines the knowledge areas that professionals leverage or develop to demonstrate their expertise. Developing these competencies positions all foundation professionals to drive equity in grantmaking practice. In addition, they develop individuals' professional profiles in five key ways.

1. Define your skills and knowledge within your organization.

The role of grants professionals is continuously shifting to meet the evolving needs of communities and funding organizations. Grants professionals are refining the vetting, record-keeping, monitoring, and customer service elements of their work while embracing new roles as change management leaders, data and learning analysts, relationship managers, and quality assurance officers. Many serve on the frontlines of organizational learning and strategy. A clear understanding of the essential skills and knowledge for grants professionals can help organizations adapt and thrive in the evolving grantmaking landscape.

2. Personalize professional development plans with the help of this tool, whether you're an individual or a professional working with others.

PEAK's *Competency Model* empowers individuals, managers, mentors, and coaches to assess and reflect on their own skill sets, strengths, and areas for growth and those of others. This comprehensive list of skills serves as a road map for career advancement. Seek opportunities to learn new skills through conferences, training programs, webinars, or mentorship. This model empowers managers, people leaders, and human resources professionals to identify employee career goals and tailor development plans to meet industry standards. Cultivating a culture of continuous learning and development can create a more fulfilling and productive work environment.

In addition to the resources identified here, a thorough understanding of the organization's history, mission, vision, and goals is crucial for employees to be effective and aligned. Additional knowledge about specific areas of their organization is also important for employees to effectively do their jobs and be good partners to internal and external stakeholders. The knowledge identified throughout PEAK's *Competency Model* can serve as a basis for employee onboarding programs.

3. Foster collaboration within your organization.

A shared understanding of the essential skills and knowledge required of grants professionals is crucial to break down silos within organizations and create an environment for effective collaboration. PEAK's *Competency Model* provides common language that grants professionals, regardless of their specific roles, can use to understand and partner with colleagues cross-functionally. By promoting collaboration and alignment, this model can help your organization work more effectively with community partners to achieve greater impact.

4. Develop accurate job descriptions.

By identifying the necessary skills and knowledge for grants professionals, PEAK's *Competency Model* supports hiring managers as they seek to attract qualified candidates, assess their suitability more effectively, and ensure a fair and equitable hiring process. Competency-based selection helps to identify transferable skills, regardless of a candidate's background or experience, promoting equity and inclusion in your organization.

5. Expand your horizons.

PEAK's *Competency Model* can help individuals build community, learn from others, and get advice from others with varied lived experiences. This resource provides an opportunity for emergent learning and growth. Share across your peer networks what resonated with you and how you plan to move into action to chart your future path and advocate for yourself.

PEAK Grantmaking

Grants Professionals Competency Model



Strategic Leadership

Promote the organization's mission and goals, and inspire colleagues to achieve them.

Demonstrating Expertise

- Embrace and support the organization's mission, goals, and values, and motivate internal and external stakeholders to do the same.
- Embrace the principles of emergent learning, a philosophy and practice that values maintaining communal spaces where people can safely learn, practice, explore, and make mistakes in the pursuit of building knowledge and skills.
- Foster a culture of curiosity, transparency, diversity, vulnerability, and collaboration.
- Develop the vision, goals, and plan to align and achieve the objectives of the programs, learning and evaluation, and finance departments with those of the grantmaking operations team.
- Serve as an influential voice for grantmaking operations, strategies, and initiatives within the organization.
- Develop the infrastructure to ensure the organization's grantmaking complies with US and international laws.
- Advocate for sufficient resources to be allocated to support the organization's grantmaking activities, including grantmaking operations.
- Advocate for grantmaking policies and practices that align with and support the organization's values.
- Design and lead the transformation of grantmaking systems and processes.
- Conduct long-term planning to ensure the success, sustainability, and relevance of the organization's grantmaking, including grantmaking operations.

Essential Knowledge

- Organizational structure and department responsibilities
- Organizational grantmaking goals
- Organizational historical grantmaking activity
- Current trends and next-level practices in grants management and grantmaking
- Basic knowledge of external factors, issues, and trends in the organization's focus areas
- Principles of and strategies for change leadership
- Principles of and strategies for effective communications
- Motivation and advocacy principles
- US and international laws on grantmaking
- IRS regulations on grantmaking
- Rationale for division of responsibilities among program, grants, legal, and finance functions and roles

Equity and Inclusion

Understand, apply, and advocate for principles that ensure fair treatment and an inclusive environment.

Demonstrating Expertise

- Foster a brave space and an environment that values, encourages, embraces, and supports differences among individuals and where all individuals feel respected, valued, and able to contribute fully.
- Identify and eliminate barriers to equity and inclusion by applying an equity lens to reveal bias in issues or situations.
- Apply practices that are proven to reduce bias at each step in the grantmaking process.
- Identify, communicate, and address issues of class, gender, power, race, and other forms of oppression within the workplace and grant-related policies and practices.
- Communicate in a culturally appropriate and inclusive manner.
- Pursue continuous learning and self-reflection to deepen understanding of equity and inclusion issues and refine practices.
- Proactively seek and engage partners from underrepresented and underserved communities.
- Include voices representing a spectrum of backgrounds and identities in grant-related decisions—from setting grantmaking priorities to making funding decisions—by using external review committees or engaging in participatory grantmaking.
- Tie grantmaking and engagement practices to organizational values. (See *resources supporting PEAK's Tie Practices to Values Principle for additional guidance.*)

Essential Knowledge

- Principles of equity and inclusion
- Self-awareness of own behavior and how it is influenced by the experience of privilege and/or oppression
- Cultural sensitivity and competency
- Interpersonal communications strategies for culturally sensitive and inclusive communications
- Historical inequities in philanthropy
- Organization's origin story and background
- Organization's equity and inclusion policies and procedures
- Strategies to enhance transparency in the grantmaking process
- Potential barriers to equity and inclusion
- Awareness of types of biases and strategies to reduce the influence of bias in decision-making and interactions

Change Management Leadership

Strategically guide, influence, and support individuals and teams through a transformation process or transition.

Demonstrating Expertise	Essential Knowledge
<ul style="list-style-type: none">• Develop a clear and compelling vision for change.• Inspire and motivate others to embrace change, influencing and building consensus throughout the transformation process.• Foster stakeholder engagement and buy-in throughout the change process by approaching work collaboratively.• Manage projects effectively, including planning, delegating, establishing goals, leading implementation, and communicating about and monitoring progress.• Apply creative solutions to unusual or challenging circumstances.• Make timely decisions informed by facts, goals, constraints, resources, risks, and stakeholder feedback.• Use sound judgment to balance efficiency and effectiveness.• Anticipate and be responsive to changes in the environment, including obstacles and challenges during the change process.• Be resilient in the face of challenges and persistent in continuing to drive change.• Assess the impact and effectiveness of the transformation, and identify areas for improvement.• Inform change process stakeholders of new developments and evolved plans.	<ul style="list-style-type: none">• Change management leadership principles• Principles of collaboration, management, meeting design, and facilitation• Process modeling approaches• Process automation methods• Process monitoring and improvement methods• Project management• Organizational goals• Organizational structure• Organizational decision-making culture, policies, and procedures• Current trends and next-level practices in grants management and grantmaking• Organizational technology tools (e.g., a grants management system, a customer relationship management system, and other databases)• Basic knowledge of external factors, issues, and trends in the organization's focus areas• Organizational legal obligations based on the type of entity• Fundamentals of exempt entities law• Fundamentals of accounting of various forms of charitable contributions

Collaboration

Build partnerships and work collaboratively with others to meet shared goals.

Demonstrating Expertise	Essential Knowledge
<ul style="list-style-type: none">• Nurture and maintain strong professional relationships founded on trust, respect, and credibility with internal and external stakeholders to foster positive and productive relationships.• Effectively bring people together to leverage their skills and knowledge to achieve shared objectives.• Facilitate and encourage an environment where everyone feels comfortable with openly expressing their ideas, even if they differ from others.• Create a culture of mutual accountability and commitment.• Adapt to different working styles and perspectives.• Anticipate, identify, mediate, mitigate, and resolve conflicts constructively.• Handle sensitive situations with tact and diplomacy.• Negotiate effectively and guide partners to agreement.• Solicit feedback from diverse stakeholders to continually improve practices.	<ul style="list-style-type: none">• Principles of and strategies for effective collaboration• Presentation and public speaking skills• Interpersonal conflict management and resolution skills• Diverse communication and learning modalities• Meeting design and facilitation skills• Organizational goals• Organizational structure• Organizational decision-making culture, policies, and procedures

Communications

Develop and deliver communications that convey a clear understanding of the unique needs of different stakeholders.

Demonstrating Expertise

- Actively listen and check to ensure others' perspectives are being properly understood.
- Express ideas clearly and concisely in written, verbal, and visual communications, adjusting communication content, style, and mode to meet the needs of different stakeholders.
- Create inclusive and safe spaces by using nonverbal cues such as facial expressions and body posture that communicate openness and receptiveness to all ideas being shared.
- Use language that is human-centered, respectful, and inclusive.
- Effectively communicate in a variety of settings, including one-on-one and small- and large-group discussions.
- Ensure materials are accessible to people with disabilities.
- Translate technical and policy information into clear and concise content that can be easily understood by a broad readership.
- Provide diplomatic, transparent, and accurate customer service and technical assistance to community partners, grantees, board, staff, community volunteers, and external stakeholders.
- Provide constructive feedback in a manner that is helpful and respectful.
- Provide timely and helpful information to internal and external stakeholders.
- Use information and knowledge to tell compelling stories and convey messages effectively, either visually or in writing.

Essential Knowledge

- Organizational communications policies and procedures
- Principles of and strategies for effective oral, written, and digital communication
- Principles of and strategies for effective customer service
- Presentation and public speaking skills
- Interpersonal conflict management and resolution
- Collaboration methods
- Diverse communication and learning modalities
- Principles of data visualization
- Meeting design and facilitation skills

Knowledge Management

Interpret and make sense of lived experiences, events, or information, constructing an understanding of various inputs, and capturing and applying knowledge to promote learning and improvement.

Demonstrating Expertise

- Foster a culture and create processes that encourage the sharing of information, resources, knowledge, lived experience, and expertise with internal and external stakeholders.
- Establish systems and processes for data collection, management, analysis, sharing, and use in decision-making and grantmaking operations.
- Make meaning or create understanding from disparate, historical data stemming from partner and community engagements, grant history (including impact and financial reports), and programmatic interventions.
- Analyze and interpret lived experiences or data to glean insights, contextualizing the information and any factors that impact how it might be understood.
- Document and leverage knowledge, including grant results and feedback from community partners, to drive innovation and inform future grantmaking approaches, priorities, and processes.
- Establish and follow document retention processes.
- Transfer knowledge and expertise to others through training, coaching, mentoring, or documentation.

Essential Knowledge

- Organization's knowledge management policies and procedures
- Principles of and strategies to support emergent learning, meaning-making (i.e., creating meaning or understanding from information or experiences), and knowledge management
- Principles of and techniques for document retention
- Principles of and strategies for data collection, management, and analysis
- Strategies to effectively share and communicate data, information, and knowledge
- Principles of data visualization

Ethics, Integrity, and Accountability

Apply moral principles and standards to make principled decisions and act with integrity and accountability.

Demonstrating Expertise	Essential Knowledge
<ul style="list-style-type: none">• Act honestly, transparently, and consistently.• Treat others fairly, equitably, and with respect.• Take responsibility for and seek to remedy mistakes, harm, and ethical breaches.• Guide and influence others to adhere to ethical standards, holding them accountable if needed.• Follow applicable codes of conduct and/or standards and established policies and procedures.• Approach relationships with community partners and grantees with sensitivity to the power inequity.• Anticipate, identify, mediate, mitigate, and resolve breaches of confidentiality and security.• Anticipate, identify, mediate, mitigate, and resolve ethical dilemmas, including conflicts of interests.• Pursue continuous learning and self-reflection to deepen understanding of ethics and ethical issues and refine standards and practices.	<ul style="list-style-type: none">• Codes of conduct for the profession and your organization• Standards for the profession and your organization• US law on self-dealing• Next-level practices in nonprofit governance and ethics• Next-level practices in grantmaking• Principles of power inequity• Principles of confidentiality• Principles of security• Principles of conflicts of interest• Strategies to manage social and political pressure in decision-making• Issues of equity, inclusion, and historical inequities• Donor intent

Data and Technology Management

Employ technology to streamline grantmaking processes and improve knowledge sharing among grantmakers, applicants, and grantees.

Demonstrating Expertise	Essential Knowledge
<ul style="list-style-type: none">• Understand data literacy and data governance principles and practices.• Proficiency in using data analysis software and creating accessible, clear, and informative data visualizations.• Keep current on new and evolving technology.• Assess the need for and recommend new technology solutions.• Align technology solutions with effective processes and principles of equitable grantmaking.• Lead or support the implementation of technology solutions, including training internal and external stakeholders as needed and partnering with technology vendors.• Develop and maintain processes that ensure the security and integrity of data.• Use data ethically and responsibly.• Share the organization's demographic data with internal and external stakeholders and communicate how demographic data collected is used and protected.• Support grantee capacity and technical skills to collect demographic data and engage in equity and inclusion work.	<ul style="list-style-type: none">• Organization's data and technology policies and procedures• Organization's culture and policies regarding security and transparency• Organization's technology tools and needs• Technology tools available to support grantmaking and the strengths and limitations of each tool• Technology standards as they relate to grantmaking and grants management• Personal and organizational data security best practices• Data governance best practices• Organization's grants management system including structure, field requirements, and output and reporting capabilities

Financial Management

Implement financial policies and controls to ensure effective and efficient deployment of financial resources for grantmaking.

Demonstrating Expertise

- Keep current on and follow fiscal guidelines, regulations, principles, and standards.
- Adhere to internal controls that detect and prevent misuse of funds.
- Seek ways to improve internal financial controls.
- Apply creative solutions to unusual or challenging circumstances.
- Plan and monitor grantmaking budget in partnership with grantmaking staff throughout the year, and recommend pursuing strategic options and opportunities as appropriate to ensure the organization disburses the minimum and/or desired grantmaking funds.
- Monitor cash flow in partnership with finance staff to ensure the organization maintains sufficient liquidity for grant disbursements.
- Monitor and report financial data to drive effective decision-making.
- Communicate financial risk tolerance and management strategies internally and externally.

Essential Knowledge

- Organizational financial policies, guidelines, procedures, and internal controls
- Organizational grantmaking budget and funding priorities
- Financial monitoring and reporting regulations, principles, and standards
- Financial data reporting approaches
- Financial management best practices
- Fundamentals of accounting of various forms of charitable contributions
- Fundamentals of exempt entities law

Staff and Community Engagement

Build the capacity of staff and volunteer grant reviewers to be successful in their grantmaking role.

Demonstrating Expertise

- Embrace the principles of emergent learning, a philosophy and practice that values maintaining communal spaces where people can safely learn, practice, explore, and make mistakes in the pursuit of building knowledge and skills.
- Encourage curiosity among staff and volunteers to reframe topics or issues with thoughtful questions and discussions by structuring listening-only, inquiry-based meetings (e.g., reflection sessions).
- Provide staff and volunteers with new experiences to develop their capabilities
- Effectively coach and provide feedback to help staff and volunteers accomplish a task, solve a problem, or strengthen knowledge, skills, and competencies.
- Identify gaps in learning and provide opportunities to address those gaps.
- Design and provide training that allows staff and volunteers to successfully carry out their responsibilities, keeping in mind the varying learning needs and styles of different stakeholders.
- Design and provide training on the organization's focus issues, funding priorities, and addressing bias in partnership with programmatic staff.

Essential Knowledge

- Organization's staff and volunteer development policies and procedures
- Principles and strategies of emergent learning
- Principles for people management, coaching, mentoring, and training
- Principles for effective staff and volunteer management and engagement
- Available methods and tools to support, promote, and assess staff and volunteer learning and development
- Resources for training and skill-building, such as philanthropic and other professional associations
- Grants management and grantmaking competencies and responsibilities
- Strategies for delivering constructive feedback in a manner that is helpful and respectful



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