



Annual Report 2019

Courage in Practice



We reflect back on 2019 through the lens of our present crises and the profound impacts they've had on our lives, our work, and those we serve.

In the face of COVID-19 and the international outcry for racial justice, have we ever felt so keenly aware of the imperative for philanthropy to get it right – to bring the full measure of our resources and know-how to meet the challenges of the moment?

Last spring, PEAK issued a call for “courage in practice” with the introduction of our Principles for Peak Grantmaking, our call-to-action to transform the practice of philanthropy into the practice of principled grantmaking.

Today, the need to put these five Principles into practice has even greater urgency. In response, PEAK’s member-led community of grants management professionals – now 5,000 strong – is rallying to adopt more flexible, responsive, and equitable grantmaking practices.

In 2019, and today, we have focused on empowering members to lead change within their organizations, and lifting up the profession and practice of grants management, efforts rooted in and supported by the Principles. Here, we report on a year full of progress and evolution, highlighting the contributions of PEAK’s board, staff, volunteers, and supporters toward:

- **Growing and deepening engagement** with our community of grants management professionals in advancing principled practice change;
- **Empowering grants management professionals** with practical tools, knowledge, and skills so they can be successful in their roles and build support for their work leading practice change in their organizations, and in the sector overall; and
- **Advancing the operational stability of the organization** and supporting a strong governance and staffing model that allows us to be nimble and innovative when responding to opportunities and challenges.

In solidarity,

Steven Casey

*Co-Chair, PEAK Grantmaking Board of Directors
Associate Director of Grants Management, John D. and Catherine T. MacArthur Foundation*

Tim Robinson

*Treasurer, PEAK Grantmaking Board of Directors
AVP - Operations and Grants Administration, The Lumina Foundation*

Mission:

We advance grantmaking so grantmakers and grantseekers can best achieve their missions.

Vision:

An equitable world in which people have the resources and opportunities they need to thrive.

Values:

Community; Diversity, Equity, and Inclusion; Integrity; Learning; Partnership; Transparency

How we grew and deepened engagement with our community of grants management professionals in advancing principled practice change:

At the core of PEAK Grantmaking, driving our ability to change the practice of philanthropy into the practice of principled grantmaking, is a robust network of grants management professionals – the keepers of grantmaking practice – who are dedicated to building their own expertise, knowledge, and skills in order to lead change in their organizations. 2019 was our biggest growth year yet, with surges in new memberships, chapter participation, and volunteerism.

A thousand new members joined us.

By year's end, the PEAK network included more than 4,400 grants management professionals, joined in a community of unparalleled knowledge-sharing and peer support.

"PEAK has always been at the forefront of aligning values with practice, helping foundations to operationalize their ideals."

–Patrick Taylor

*Grants Manager, Zellerbach Family Foundation,
Organization Member since 2015*



"Our Organization Membership in PEAK – and the ease of access it provides to a wealth of educational and community resources – is more important than ever in a volatile world that demands we work together to advance more purpose-driven and equitable funding practices."

–Jim Gallagher

*Director, Grants Management, Ford Foundation,
Organization Member since 2010*

We set a new record for contributing memberships.

In 2019, 368 organizations supported their teams and invested in our work with Organization Membership.

2019 also saw the beginning of plans to substantially expand support for our Organization Members, with the rollout of exclusive resources like Principles for Peak Grantmaking how-to guides and a re-envisioned *Journal*.



A record 224 volunteers fueled our network.

PEAK is truly a member-led organization, thanks to the dedication of our volunteer corps – from our board of directors and chapter officers, to those who sat on committees, working groups, and task forces; course testers; and conference co-chairs, planning teams, and session reviewers.

Giving back is meaningful work: PEAK volunteers report high levels of satisfaction in their ability to support peers, contribute to the profession and field, expand their professional networks, and raise their profiles as individuals. In 2019, we increased support for chapter leaders with new networking and learning opportunities, including leadership training at our Chapter Leadership Summit.

"Volunteering with PEAK has been a wonderful experience that has strengthened my network, advanced my leadership skills, and allowed me to contribute to the field. I have thoroughly enjoyed the opportunity to serve alongside bright and thoughtful colleagues who are eager to make meaningful change."

–Nicole Larsen

*Director, Grants Administration, The Ralph M. Parsons Foundation,
Organization Member since 2011*



How we empowered grants management professionals with practical tools, knowledge, and skills so they can be successful in their roles and build support for their work leading practice change in their organizations, and the sector overall:

Over the past three years, we have focused on increasing member engagement in practice-change efforts. With the development of the Grants Management Professional Competency Model and the Principles for Peak Grantmaking, we've launched our most ambitious efforts to date in researching, discussing, and creating resources that build member value and support our unique position in the field.

To amplify these practice-change initiatives, we introduced an expanded schedule of member and partner events, and boosted online engagement through a new website, communications, and publishing program – lifting up the profession and the practice of grants management in the sector.



With our Principles for Peak Grantmaking launch, we issued a sector-wide call-to-action.

We began with a white paper, spotlighting just how crucial grantmaking practices are to impact and equity. We then began delivering the tools in fall 2019, with the release of our first suite of case stories, action planners, how-to guides, webinars, and other resources to support practice change amongst our members around the first of our Principles: Tie Practices to Values.

"I see PEAK, among the major philanthropic affinity groups, as the primary driver of values-based grantmaking, particularly with the five Principles for Peak Grantmaking."

– Dan Gaff

*Director of Grants Management,
May & Stanley Smith Charitable Trust,
Organization Member since 2016*



Engagement in learning soared.

3,498 attendees joined us for 91 events, including 20 webinars and 71 chapter meetings. Event attendance surged 22 percent over 2018.

Our programming centered around our Principles for Peak Grantmaking efforts, focusing on content related to power, diversity, equity, and inclusion in the philanthropic space and how it shows up across the grantmaking lifecycle.

What's more, the experiences were valuable: 87 percent of participants reported that what they learned empowered them to improve their grantmaking practice – by way of gaining new knowledge and skills, applying what they've learned, and making new and deepened connections with peers.



"For grants management professionals, PEAK's annual conference is a must to learn and connect with others in the field: those who have been in your shoes, understand you, and are willing to help. The most valuable thing you will gain by attending? The PEAK network is like no other."

– Shonda Barnett

PEAK2020 Co-Chair and Senior Manager - Grants, Texas Women's Foundation, Organization Member since 2020

PEAK2019 was our biggest annual conference yet.

Our Denver event brought together a record 787 attendees, representing a 28 percent growth in attendance over the past three years, along with increased support from sponsors and exhibitors.



The PEAK tradition of active peer-sharing continued on CONNECT.

Nearly 1,300 members logged into PEAK's discussion forum across the year, authoring and accessing 2,335 posts and downloading peer-contributed documents almost 10,000 times.

"PEAK is where I go when I have a question, when I need resources, or just when I want to connect with other PEAKers!"

–Frida Hatami

*Grants Manager, Roy + Patricia Disney Family Foundation,
Organization Member since 2016*

We raised our collective voice to advocate for the profession, and for practice change.

In 2019, we increased our emphasis on developing and nurturing partnerships to spread the word about the strategic role of grants management and the practice of principled grantmaking. Through new and deepening collaborations with fellow philanthropy-serving organizations, affinity groups, and regional associations, PEAK delivered 20 webinars, in-person workshops, and conference sessions, reaching almost 450 people outside our membership. Our message was amplified through collaborative content development and content sharing.

We focused on improving members' online experience with PEAK.

We started last spring by launching a new peakgrantmaking.org with a more accessible, mobile-friendly platform for delivering resources, events, and insights.

A mid-year communications program refresh sharpened our focus on delivering content and tools that elevate grants management professionals in expertise and impact. The results included a surge in online engagement, with a 30 percent growth in article pageviews and a 54 percent increase in resource downloads over 2018.



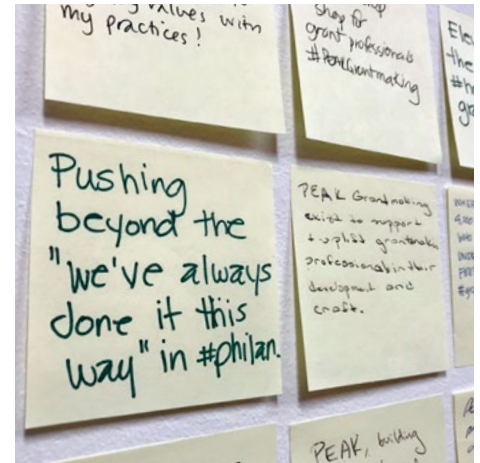
How we advanced the operational stability of the organization and supported a strong governance and staffing model that allows us to be nimble and innovative when responding to opportunities and challenges:

2019 was a year of change and progress for the PEAK team.

We said good-bye to longtime executive director Michelle Greanias, and implemented a staff reorganization to clarify roles and expand our workforce to meet member needs. The year ended with a search for our next leader underway, a strengthened core team, progress toward the establishment of a new performance management process, and steps to strengthen organizational culture.

Our board of directors has been a key asset and partner in guiding the organization's success.

In turn, we expanded support for board members' success, both individually and collectively, with the addition of a strong orientation program, individual performance plans, ongoing training, and a mentoring pool.



We advanced planning – and realized initial progress – in modernizing and integrating our technology infrastructure to better support staff and members.

Projects are underway to retire outdated resources, align content across systems, ease data collection and use, and implement a multi-phased web-development project to create a more seamless user experience.

■ Financials

PEAK Grantmaking's audited financial statements are posted [here](#), and a complete copy of PEAK's consolidated financial statements is available upon request.

PEAK Grantmaking Statements of Financial Position December 31, 2019 and 2018

Assets	2019	2018
Cash and cash equivalents	\$503,985	\$708,986
Grants and contributions receivable	\$211,000	\$228,407
Prepaid expenses and deposit	\$57,220	\$32,672
Investments	\$1,052,104	\$814,599
Property and equipment, net	\$7,582	\$18,210
Total Assets	\$1,831,891	\$1,802,874
Liabilities	2019	2018
Accounts payable and accrued expenses	\$81,056	\$28,872
Deferred revenue	\$630,087	\$530,319
Total Current Liabilities	\$711,143	\$559,191
Net (Deficit) Assets	2019	2018
Without donor restrictions:		
Undesignated	(\$498,244)	\$21,216
Board-designated operating reserve	\$1,052,104	\$814,599
Total without donor restrictions	\$553,860	\$835,818
With donor restrictions	\$566,888	\$407,865
Total Net Assets	\$1,120,748	\$1,243,683
Total Liability and Net Assets	\$1,831,891	\$1,802,874

PEAK Grantmaking
Statement of Activities
For Year Ended December 31, 2019

Revenue and Support	Without Donor Restrictions	With Donor Restrictions	Total
Grants and contributions	\$636,599*	\$521,650	\$1,158,249
Annual conference	\$860,774	\$67,625	\$928,399
Other registration fees	\$4,770		\$4,770
Membership dues	\$545,704		\$545,704
Investment income	\$163,196		\$163,196
Product sales	\$12,523		\$12,523
Other income	\$10,323		\$10,323
Released from restrictions	\$430,252	(\$430,252)	—
Total Revenue and Support	\$2,664,141	\$159,023	\$2,823,164
Expenses	Without Donor Restrictions	With Donor Restrictions	Total
Programs	\$1,870,315		\$1,870,315
Member engagement	\$581,491		\$581,491
Total program services	\$2,451,806		\$2,451,806
Management and general	\$393,672		\$393,672
Fundraising	\$100,621		\$100,621
Total supporting services	\$494,293		\$494,293
Total expenses	\$2,946,099		\$2,946,099
Change in Net Assets	(\$281,958)	\$159,023	(\$122,935)
Net Assets , beginning of year	\$835,818	\$407,865	\$1,243,683
Net Assets , end of the year	\$553,860	\$566,888	\$1,120,748

*Organization Membership contributions accounted for \$519,076 of these grants and contributions.
A total of \$1,064,780 came from membership dues and contributions.

Acknowledgements

We are grateful for the generosity, enthusiasm, commitment, and invaluable contributions of our members, volunteers, and supporters. Truly, you are the heart of PEAK!

Sustaining Organization Members

Annenberg Foundation
Bill & Melinda Gates Foundation
The California Wellness Foundation
Carnegie Corporation of New York
Charles Stewart Mott Foundation
Fifth Third Foundation
Gordon and Betty Moore Foundation
John D. and Catherine T. MacArthur Foundation
McKnight Foundation
Robert Wood Johnson Foundation
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Organization Members

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Ahmanson Foundation
AIG
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Altman Foundation
American Jewish World Service
American Society for the Prevention of Cruelty to Animals (ASPCA)
American Student Assistance
Amgen Foundation
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Bush Foundation
C & W Creative Endeavors

C.E. and S. Foundation
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California Humanities
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Candid
Capital One
CareFirst BlueCross BlueShield
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Fifth Third Foundation
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 GHR Foundation
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 Greater Texas Foundation
 Harold K.L. Castle Foundation
 Harry and Jeanette Weinberg Foundation
 Hartford Foundation for Public Giving
 Harvey L. Miller Family Foundation
 Hau'oli Mau Loa Foundation
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 Health Care Service Corporation
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 Health Foundation for Western and Central New York
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 McNeely Foundation
 Medtronic Foundation
 Mertz Gilmore Foundation
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 Metta Fund
 Meyer Foundation
 Meyer Memorial Trust
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 Middlesex Savings Charitable Foundation
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 Mitsubishi Electric America Foundation
 Monterey Peninsula Foundation
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 Oregon Tourism Commission dba Travel Oregon
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 Russell Sage Foundation
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 S. D. Bechtel, Jr. Foundation
 Saint Luke's Foundation
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 Samuel S. Fels Fund
 Sheltering Arms Foundation
 Sherwood Foundation
 Sisters Health Foundation
 Skillman Foundation
 Skoll Foundation
 Sobrato Family Foundation
 Spencer Foundation
 Springfield Foundation
 Staten Island Foundation
 Strada Education Network
 Strategic Grant Partners
 Stream Life Consulting LLC
 Stuart Foundation
 Stupski Foundation
 Sunflower Foundation
 Support Our Aging Religious
 Surdna Foundation
 TCC Group
 TCF Foundation
 Tempest Advisors
 The 1434 Foundation
 The California Endowment
 The Cannon Foundation
 The Champlin Foundation
 The Char and Chuck Fowler Family Foundation
 The Christensen Fund
 The Colorado Health Foundation
 The Educational Foundation of America
 The Florida Bar Foundation
 The Ford Family Foundation
 The Foundation for a Healthy High Point
 The Gerber Foundation
 The Heinz Endowments
 The John R. Oishei Foundation
 The Joyce Foundation

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Teresita Maz, Blue Cross and Blue Shield of North Carolina Foundation
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