

# Successful Structures

Grants Management and  
Foundations of the Future



PEAK Grantmaking

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- PEAK Grantmaking is a member-led national association of 3,600 professionals who specialize in grants management for funding organizations. The people of PEAK Grantmaking come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector.
- This is where *Practice Meets Purpose*. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we support grantmaking practices designed to maximize mission-driven efficiency and effectiveness of funders of every size.
- **PEAK Grantmaking's vision is of an equitable world, in which people have the resources and opportunities to thrive.**
- **Our mission is to advance grantmaking so that grantmakers and grantseekers can best achieve their missions.**



***“...if our unique contribution is grantmaking, how we make grants must be just as strategic, just as focused on outcomes, as anything else we do.”***

Mandy Ellerton, Community Innovation Director  
The Bush Foundation

# Session Objectives

- Learn what it means to work toward a successful structure.
- Hear how funders work toward best coordination, communication, and effectiveness, and how grants management staff have shifted their role.
- Consider ways to gain influence, demonstrate increased value, and build more successful structures in your own organizations.

# Questions

To what extent is practice (the how) valued as integral to strategy?

What is grants management's role?

How can grants management fulfill its potential within philanthropic organizations?

How do other staff/leaders perceive grants management's value?

What does it take to create a well-integrated structure, where practice and program work together to support strategy?

# Where Do You Fall?



1. To what extent is grants management siloed from program or integrated with program staff?
2. To what extent are conversations about how grants are made (application and reporting requirements, grant terms, due-diligence practices, communication with grantees) a part of your organization's regular full staff conversations?
3. When decisions about structuring grantmaking programs, structuring individual grants, and setting organizational priorities are made, are you more "downstream" or "upstream"?



# Successful Structure

## Intentional alignment

of grantmaking operations & grantmaking program work  
**to support strategy**

*Practically speaking:*

- How you make your grants lines up deliberately with what you're trying to accomplish
- You use feedback and data to continually improve grantmaking practices
- Grantmaking systems and relationships become more efficient, effective, and have greater impact over time.



# Evidence That Practices are Valued

- Goals in strategic/annual plans related to how grants are made
- Grantmaking process & practice discussed at program and all-staff meetings
- Grantmaking process discussed at board meetings
- Elements of grantmaking practice in “dashboards” or other data-review tools
- You assess the effectiveness and/or efficiency of how your grants are made

# Practices



# Successful Structures



## *Think & Discuss*

**What needs to be in place for an organization to move toward a “successful structure”?**

# 1.

**Senior leadership values effective practice and demonstrates that how grants are made matters.**

**“We had a president who really wanted to understand how we were operating our grants and managing our programs from beginning to end. We could lead the charge, but that question was coming from the highest level.”**

**Marc McDonald, Director of Grants Management  
AARP Foundation**

**Foundation staff and leaders understand and value the connection between practices and results.**



# Valuing means that leaders:

- ✓ Communicate that grants management is connected to effectiveness
- ✓ Make sure grants management has a spot at the leadership table
- ✓ Seek to understand best grantmaking practices
- ✓ Speak and writes about the importance of how grants get made
- ✓ Invites feedback from staff on grants management

# 2.

**Grants management expertise is “upstream” in the decision-making process.**

**“We have flagged GM as a key partner in the development of strategy. They can identify where there’s risk, where there might be obstacles in a plan we’re considering. There are strategic flags that they can wave if they’re brought in at the right point in the process.”**

Fay Twersky, Director, Effective Philanthropy Group  
Hewlett Foundation

**When grants management is at the leadership table, practices are more likely to be discussed and integrated into strategy.**



Organizational Behavior...	When GM is Never/Rarely at Leadership Table	When GM is Sometimes/ Often at Leadership Table
Include goals in <b>strategic/annual plans</b> related to how grants are made	27% - often 23% - sometimes	56% - often 23% - sometimes
Discuss the process by which grants are made at <b>program staff meetings</b>	44% - often 30% - sometimes	56% - often 20% - sometimes
Discuss the process by which grants are made during <b>all-staff meetings</b>	7% - often 32% - sometimes	28% - often 34% - sometimes
Discuss the process by which grants are made at <b>board meetings</b>	9% - often 39% - sometimes	30% - often 41% - sometimes
Include elements of grantmaking practice in organizational <b>“dashboards” or other data-review tools</b>	15% - often 16% - sometimes	31% - often 28% - sometimes
<b>Assess the effectiveness</b> and/or efficiency of how your grants are made	20% - often 47% - sometimes	49% - often 39% - sometimes

**MORE!**

# 3 ■

**Deliberate cross-functional structures increase empathy and communication.**

**“We need to develop greater empathy for the priorities and responsibilities of the other roles - rather than seeing them as burdens to be worked around. And we all need to be focused on an aligned understanding of what is best for the whole foundation's work.”**

Marissa Tirona, Program Director  
Blue Shield of California Foundation

# 4.

**Grants management is positioned as a “hub” for data analytics, leading to learning in real time.**

**“We see grants management as critical to the integration of our work. They need to lead the analytics. The role becomes the hub of the organization - not just a transactional piece.”**

Peter Long, CEO, Blue Shield of California Foundation

# Grants Manager as Data Hub



# Assessing the How of Grantmaking

1. Does our grantmaking align with our intentions?
2. Are our grants structured to be successful?
3. Are we efficient in our internal processes?
4. Are we communicating effectively?
5. Does our process strengthen and support grantees?

# 5.

**Grants Management 2.0 emphasizes a different kind of “talent” and professional development.**

**“I want [grants managers] who are open to changing their work because new technology can take care of the basics, which should allow them to focus on adding value to our program staff and grantees through training, problem-solving and collaboration.”**

Satonya Fair, Director of Grants Management  
Annie E. Casey Foundation

**Promising areas for grants managers' growth include using and interpreting data and improving grantmaking processes.**



# If your GM could do one thing differently...

“Demand to be listened to - they are at the heart of what we do, but often seen as ‘administrative.’”

“Continue to streamline processes and leverage database tools/dashboards to help guide program staff planning and decision making”

“Gather data from grants in such a way that it can be more easily analyzed and interpreted.”

“...provide insight into how grants processes can and do impact grantee effectiveness and therefore outcomes”

**Grants managers want to do more...but day-to-day workload poses an obstacle**



# Successful Structures Story

1. What caused your organization to make a change to your role and organizational structure?
2. What changed – and why?
3. What did you do, in your role, to gain influence and demonstrate value? How'd that work? How'd it feel?
4. Is there anything you'd do differently if you had a do-over?
5. What's next on the horizon?

# Think & Discuss



1. How would you like your role/relationships to develop in the next year?
2. What challenges do you anticipate needing to overcome (and how will you do it)?
3. What have you already tried that's worked for you in moving toward a more influential role?
4. Practical next steps



## 3 Next Steps

1. **Assess your current grantmaking practice and share what you see.**
2. **Exchange information about priorities and concerns**
3. **Introduce “Assessing the How of Grantmaking”**



# [www.peakgrantmaking.org/ successfulstructures](http://www.peakgrantmaking.org/successfulstructures)

Learn more, get resources, and talk about successful structures with your grantmaking peers.