



Report on 2018 Activities

2018 marks the mid-year of work on PEAK Grantmaking's three-year (2017-2019) strategic plan. The plan includes the following key goals designed to advance grantmaking so grantmakers and grantseekers can best achieve their missions.

1. Grantmakers adopt efficient, effective, and equitable values-based practices.
2. Experts in grantmaking practice lead their organizations to implement these practices.
3. A strong and growing network of grantmakers engages together to accelerate momentum for field-wide practice improvement.
4. PEAK Grantmaking has the governance, resources, and infrastructure to achieve its strategic plan goals and be accountable to members and funders.

By reaching these goals, we believe PEAK Grantmaking can help position philanthropy to realize our vision of an equitable world in which people have the resources and opportunities they need to thrive.

This report highlights the collective accomplishments of PEAK Grantmaking's board, management, staff, and volunteers during 2018.

Values-Based Grantmaking



Grantmaking includes three primary components: what, who, and how. As grantmakers, most of us pay attention to what we fund—program areas and impact—and who we fund—the grantees we support. But what about how we fund? PEAK Grantmaking contends that grantmakers should pay equal attention to how grants are made, evaluating and continually improving the practices used to make grants.

Our goal is for grantmakers to adopt efficient, effective, and equitable values-based practices. Our 2018 results toward this goal are summarized below.

Principles for Peak Grantmaking Took Shape

Grantmaking practices—the steps funders take to effectively, efficiently, and equitably mobilize resources to achieve shared goals with grantees—are central to the success of grantmaking institutions and the causes, organizations, and people they support. In fact, our research shows that 90 percent of funders reported understanding and valuing the connection between practices and results. However, research by PEAK Grantmaking and others shows significant gaps between understanding and action.

We see great potential in lifting up a new set of principles, rooted in each grantmaker's values, that define how effective grantmakers operate. During 2018, our members participated in working groups

and focus groups to help us develop the Principles for Peak Grantmaking, thereby ensuring that the Principles are by members, for members, and helpful to members. This work sparked thoughtful conversations about practices in the field and provided us with member input on our strategic direction for the years ahead.

The Principles will be shared with the field in 2019. PEAK Grantmaking will support our members as they engage with peers to learn together, build expertise in key competencies needed to implement change, and then follow through to implement better grantmaking practices.

Practices Changed

In 2018, we engaged more than 1,600 individuals in face-to-face conversations on improving practices. Ninety-eight percent of those who filled out an evaluation from these sessions committed to changes—both small and significant—in their practices. Topics included aligning a funder's values with its practices, equitable practices, demographic data, and streamlining.

We reached many members through these sessions, but also worked to reach beyond our membership—to program teams, the c-suite, and board members—to build more champions who value grantmaking practices and the people who manage them.

In addition to direct outreach, we worked to change practice and build champions by:

- Providing public resources through our website, with [Insight, Impact, and Equity – Collecting Demographic Data](#) ranking as the most downloaded resource in 2018.



- Releasing issues of the [PEAK Insight Journal](#) on “Revisit Reporting” and “International Grantmaking” and beginning an issue on “Social Justice Grantmaking.” We featured several high-profile authors, which helped more than double the page views of the journal from 7,917 in 2017 to 16,873 in 2018.
- Continuing to provide a platform for experts to share ideas and advice with the field through our blog. Our top five blog posts were:
 - [Using Data to Collaborate](#)
 - [Advice from Your Grantmaking Peers: Avoid These Pitfalls](#)
 - [From Procedural to Principled: A Short Recent History of Grants Management](#)
 - [Follow the Yellow Brick Road to a New Online System](#)
 - [No More Band-Aids: How Funders Can Advance Systems Change](#)
- Doubling our [Twitter](#) following from 2,713 people in 2017 to 5,300 people in 2018.

Two Projects Brought to Conclusion

We discontinued the EPICenter, which was built as a tool to identify current grantmaking practices and track changes in practice over time. We now are focused on discreet research projects that can inform the field about the state of practice, which will be shared as part of the Principles for Peak Grantmaking in the years to come.

In addition, we concluded our Thought Leadership program, as planned. Through the four-year experiment, we trained and supported grants management professionals interested in developing as thought leaders. We continue to support members interested in elevating their voices through our social media, blog, journal, and speaking opportunities.



Experts and Leaders



For foundations and other philanthropic institutions to help grantseekers best achieve their missions, grants managers need to be experts in their work. They need to link knowledge with relationships and systems to improve grantmaking decisions and design. They need to understand and advocate effectively for good practices in their organizations. And, they need to implement those practices successfully.

There are no existing university degrees, widespread trainings, or professional certifications for grants management, like there are in other sectors. This is where PEAK Grantmaking comes in. We are the only place grantmaking professionals can turn to gain industry-specific expertise.

Our goal is to build experts in grantmaking practice, who can lead their organizations to implement efficient, effective, and equitable practices. Our 2018 results toward this goal are summarized below.

Grants Management Professional Competency Model Released

To become experts and leaders, grants management professionals need access to learning that encompasses the entirety of what they need to know to do their work. To date, PEAK Grantmaking has delivered relevant programming based on the profession's interests and needs. However, that programming has not encompassed all a professional needs to know to become an expert in grants management.

To identify the scope of the learning needed, PEAK Grantmaking released the [Grants Management Professional Competency Model](#) in 2018. This competency model will guide educational program development in the future.

The competency model identifies what a professional needs to know to manage the key processes in the grantmaking lifecycle, including: 1) awareness and positioning, 2) guidelines and education, 3) application review and recommendation, 4) awards and agreements, 5) monitoring and evaluation, and 6) closing and communications. The model also identifies the cross-cutting competencies and skills needed to execute the work successfully in the areas of strategy, technology, financials, knowledge management, and people management. In addition, the model explores the skills and knowledge needed in areas including communications; ethics; and diversity, equity, and inclusion. The model applies to any organization with a grants management function, no matter the size of the organization or the amount of its resources.

With this roadmap, PEAK Grantmaking's goals are to:

- Increase participation in existing channels, expand content, and introduce new ways to learn that increase access to learning and allow members to deepen their knowledge.
- Recognize established and developing experts through accolades (e.g., digital badges, certificates of completion and participation).
- Identify transferrable skills and abilities that apply to grantmaking and can widen the recruitment of qualified professionals and bring more diverse people into the profession.
- Align our learning with the Principles for Peak Grantmaking.



After debuting in February 2018, the competency model quickly became the most referenced, viewed, downloaded, and used tool for talent management and development that PEAK Grantmaking has produced. We aligned program development, valuated knowledge needs, and created tools to assess individual and team competency based on the model. The competency model provides members seeking guidance on professional development with a road map to close gaps in their competency. PEAK Grantmaking members have reported success in securing promotions, raises, staff additions, and responsibility changes from using the tool.

"I think conversations to share the PEAK Grantmaking competency model with our director of HR, my director's solid support, and my achievements over 11 years here all played key roles in my promotion."

–PEAK Grantmaking member on her promotion

In the second quarter of 2018, PEAK Grantmaking launched "Learning Advisor," to help members create personalized performance development plans to build competencies. This tool is available to organization members. Over the year, 126 people employed the tool to assess their competency in their specific

grants management role. The Ford Foundation, the first organization member to use Learning Advisor for a team assessment, used the tool to identify how to best support, retain, and plan for future talent. Our Southern California Regional Chapter used results from assessments by its chapter members to design chapter programming. Three regional chapters hosted programs that used the Learning Advisor and professional competency model to help chapter members plan their professional development.

2,200 People Built Competencies through PEAK Grantmaking

By the end of 2018, we had exceeded our objective of a 10 percent increase in participation in our learning programs, with a 14 percent increase driven by users of LEARN, PEAK Grantmaking's knowledgebase.

Our 2018 member survey confirmed that PEAK Grantmaking members continue to rate engaging with peers, building their expertise, and implementing better practices as the most important functions of PEAK Grantmaking. Members reported that our learning opportunities met their needs in all three of those areas.

In 2018 post-engagement surveys:

Connections

Expertise

Practices



EVENTS

88% reported that they built new relationships and **48%** reported that they deepened existing relationships

79% reported that they learned something

80% reported that they plan to change practices as a result of what they learned



WEBINARS

N/A

94% reported that they learned something

89% reported that they plan to change practices as a result of what they learned



92% reported Connect contributes to their sense of community in PEAK Grantmaking

84% reported that important information needs are met through Connect

96% reported information is highly useful/transformational in their work

Membership



At its heart, PEAK Grantmaking is an organization by and for our members. Our membership programs are designed to grow membership and engage our members with PEAK Grantmaking, with each other, and with the profession.

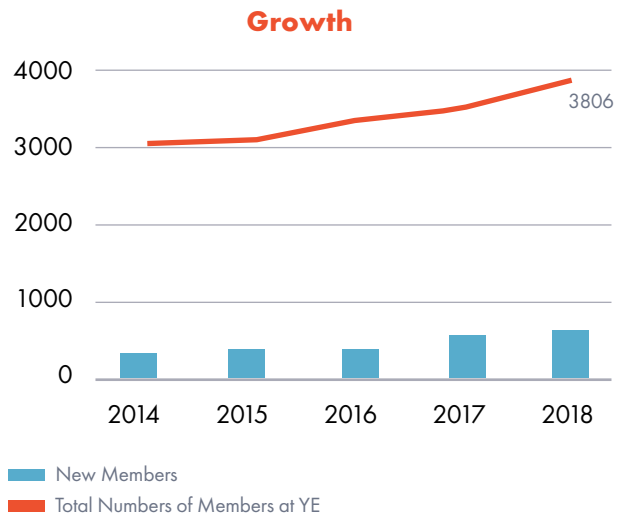
Our regional chapter programs provide local opportunities for engagement and education, while also serving as a vibrant two-way channel for dissemination of PEAK Grantmaking products and collection of information about members and their

concerns. None of the work we do would happen without the enthusiastic and enduring participation of hundreds of volunteers who make possible the annual conference, regional activities, and much more.

As a member-driven organization, we solicit feedback from our members, and in 2018, we undertook a comprehensive member survey, coupled with in-person focus groups. Our goal is to build a strong and growing network of grantmakers engaging together to accelerate momentum for field-wide practice improvement. Our 2018 results toward this goal and selected results from our member survey are summarized below.

630 New Members Joined PEAK

PEAK Grantmaking welcomed 630 new members in 2018. This exceeded our 2018 objective of engaging 450 new members. We attribute this increase to consistent promotion of membership benefits on PEAK Grantmaking’s website and in its online publications and to following up with non-members who participate in our programs. We grew 8 percent from 2017, which is consistent with industry averages.



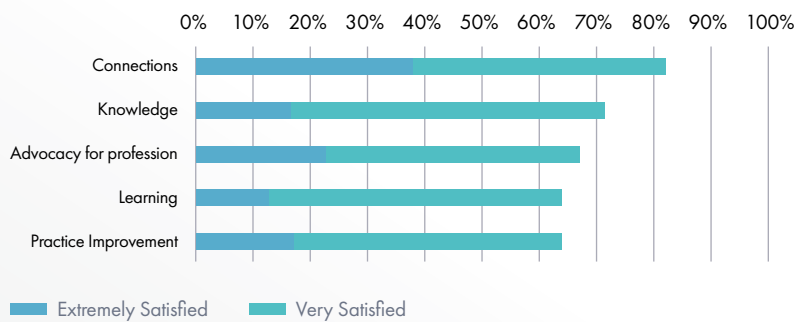
PEAK Members Stayed Members

People continue their membership with PEAK Grantmaking at a much higher rate than the industry average. In 2018, 67 percent of our membership had been members for at least three years. We attribute our high retention rate to: our many online and in-person networking opportunities; our relevant,

high-quality education and information resources; and no financial barrier to membership. When members do end their engagement with PEAK Grantmaking, the primary reason is because they’ve left their organization. This reason accounted for 88 percent of lapsed members in 2018.



Satisfaction with PEAK Grantmaking's Work



Member Satisfaction Increased

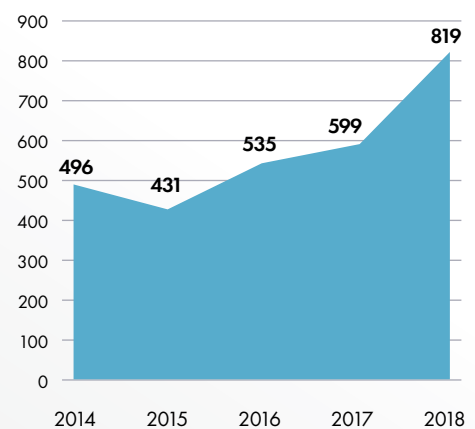
Member satisfaction continued to rise. Between 2015 and 2018, the percent of members describing themselves as “extremely satisfied” or “very satisfied,” overall, grew from 58 percent to 73 percent. In 2018, between 64 percent and 82 percent of members described themselves as “extremely satisfied” or “very satisfied” with key elements of PEAK Grantmaking’s work.

Chapter Engagement Was Also Up

In 2018, we witnessed a 46 percent increase in registrations for regional chapter events over the previous year. We attribute this increase to our efforts to create successful hybrid events that offer opportunities for in-person *and* virtual participation. More than half (51 percent) of all education-focused regional chapter meetings this year offered a virtual component—webinars, in-person meetings with a webinar component, and meetings with multiple in-person locations connected through video conference—while maintaining the same high satisfaction rates among participants.

Connecting our members to each other remains the primary purpose of our regional chapters, and 2018 post-engagement surveys showed the chapters achieved that goal.

People Participating in Regional Chapter Events



Connections



98% reported that they built new relationships and **93%** reported that they deepened existing relationships

Expertise

79% reported that they learned something

Practices

55% reported that they plan to change practices as a result of what they learned

To interest more people in our regional chapters, in 2018 we designated time for them to meet during our annual conference. Thirteen chapters took advantage of the opportunity, and 53 percent of all conference

attendees participated in a regional chapter meeting. Ninety-six percent of regional meeting participants rated the event as “good” or “very good.”

Governance, Resources, and Infrastructure



Our goal is to ensure that PEAK Grantmaking has the governance, resources, and infrastructure to achieve its strategic plan and be accountable to members and funders.

PEAK Grantmaking entered 2018 with significantly greater resources, as a result of a successful campaign that raised close to \$2.5 million to support increased capacity and expanded programming. Our staff grew to 10 members, and our improved technology platform supported internal operations and external member learning. We made key changes to our governance structure and implemented a financial model that will be critical to sustaining our growth over time, including new earned and contributed income sources. Visit our website to view our [2018 audited financial report](#).

We'd like to thank our [Organization Members](#), sponsors, and funders for their financial contributions that make the work of PEAK Grantmaking possible.

The early results of these changes supported the belief that PEAK Grantmaking will successfully sustain its new level of capacity, programming, and operations in the long term and remain the only organization in the grantmaking space with a voluntary dues structure designed to facilitate open access to our resources and programming.



Thank You



PEAK Grantmaking is a member-led organization, of grantmakers and by grantmakers. Our volunteers have always been, and continue to be, essential to the organization's existence and collective success. [Volunteerism](#) is an opportunity for members to build their leadership skills, and volunteer leadership helps retain experienced members. Ninety-nine percent of our 2018 volunteers would encourage a colleague to volunteer, up from 96 percent in 2017.

The following is a list of our 2018 volunteers:

Joyce Alexander, T. Rowe Price Foundation	Amy Brooks, The Rees-Jones Foundation	Lisa Colaninno, The Travelers Companies, Inc.	Angelina Gonzalez, The California Endowment
Jamie Amagai, The Summit Charitable Foundation	Andrew Brown, Eugene & Agnes E. Meyer Foundation	Amy Cole, Nuclear Threat Initiative, Inc.	Paige Granger, Open Society Foundations
Kim Armstrong, Mutual of Omaha Foundation	Aimee Bruederle, The William and Flora Hewlett Foundation	Phyllis Corkum, Edyth Bush Charitable Foundation, Inc.	Diane Grossman, Sheltering Arms Foundation
Katrina Ashley, The Annenberg Foundation	Nicole Buggs, Carnegie Corporation of New York	Kelly Costello, Temple Hoyne Buell Foundation	Amy Hall, Georgia Power Foundation
Nicole Austin-Thomas, Citi Foundation	Nicholas Burt, The Richard H. Driehaus Foundation	Kent Cozad, amFAR (The Foundation for AIDS Research)	Heidi Halvarson, The Medtronic Foundation
Robin Barker, George Family Foundation	Mina Camacho, The Henry Luce Foundation	Cheryl Dabat, The Heinz Endowments	Jenna Hansen, Kaiser Permanente
LaShonda Barnett, Texas Women's Foundation (formerly Dallas Women's Foundation)	Janet Camarena, Foundation Center	Deb Debbaut, Iowa West Foundation	Carly Hare, CHANGE Philanthropy
Carla Batts, Allegany Franciscan Ministries, Inc.	Alexia Cameron, Medina Foundation	Jaime Dixon, Foundation for a Healthy St. Petersburg	Indya Hartley, The ELMA Philanthropies
Cheryl Bean, Sunflower Foundation	Brad Cameron-Cooper	Elizabeth Donohue, Rockefeller Philanthropy Advisors	Tara Havlicek, Mitsubishi Electric America Foundation
Joe Behaylo, Open Society Foundations	Angela Carr, Weingart Foundation	Gina Dotson, Burton D. Morgan Foundation	Kelly Hayashi, Heising-Simons Foundation
Christina Bernard, Pacific Hospital Preservation & Development Authority	Steve Casey, John D. and Catherine T. MacArthur Foundation	Stephanie Duffy, McKnight Foundation	Ashley Heath, United Way Suncoast
Aiko Bethea, Fred Hutch Cancer Research Center	Michael Castens, The Winthrop Rockefeller Foundation	Kori Dunaway, Raikes Foundation	Joyce Holliman, The Kresge Foundation
Katrin Blucker-Ludwig, Methodist Healthcare Ministries	Denise Centkowski, Unitarian Universalist Veatch Program at Shelter Rock	Ashley Dunn, The Heckscher Foundation for Children	Nakia Horton, The Harry and Jeanette Weinberg Foundation, Inc.
Kevin Bolduc, Center for Effective Philanthropy	Antonia Cermak-Terzian, Conservation International Foundation	Jessica Eting, College Futures Foundation	Kerri Hurley, The Barr Foundation
Susan Bouchard, Agnes M. Lindsay Trust	Candy Champion, Turner Foundation, Inc.	Satonya Fair, The Executive Leadership Council (ELC)	Robert Hybben, Butler Family Foundation
Nancy Brodnicki, Yawkey Foundations	Danielle Cheslog, Otto Bremer Trust	Adrienne Fisher, Doris Duke Charitable Foundation	Lourdes Inga, International Funders for Indigenous People
TeQuion Brookins, McGregor Fund	Deborah Clark, Woods Fund of Chicago	Mallory Fitzgerald, Pacific Hospital Preservation & Development Authority	Beth Jarrard, J. Bulow Campbell Foundation
		Kim Foster	Keri Jaynes, Grand Rapids Community Foundation
		Susan Fulton, Endowment for Health	Adriana Jimenez, American Jewish World Service
		Dan Gaff, May and Stanley Smith Charitable Trust	Beery Jimenez, Proteus Fund
		Andrea Garvey, The Schott Foundation for Public Education	Heather Johnson-Banks, Cuyahoga Arts and Culture
		Julie Gaston, The Henderson-Wessendorff Foundation	Baily Jones, Peter and Carmen Lucia Buck Foundation
		Tiauna George, Chan Zuckerberg Initiative	Diane Kaszei, The Cleveland Foundation
		Mary Giraulo, United Arts of Central Florida	Jennifer Katell, The California Endowment
		Allison Gister, Conrad N. Hilton Foundation	Dana Kawaoka Chen
			Roland Kennedy, Wellspring Philanthropic Fund
			Rachel Kimber, Arcus Foundation



Laura Kimura, The William and Flora Hewlett Foundation	Caroline Miceli, Satterberg Foundation	Joanna Randazzo, Petco Foundation	Elizabeth Tabita, The California Endowment
Rosa King, The Carl Gellert and Celia Berta Gellert Foundation	Sarita Michaca, Citi Foundation	Dee Reed	Patrick Taylor, The Zellerbach Family Foundation
V. Ruth Klette, Elsa M. Heisel Sule Foundation	Carol Miller, Greater Texas Foundation	Joanne Reilly, Longwood Foundation	Linda Thompson, Helios Education Foundation
Karin Krslovic, Ford Foundation	Nora Mitnick, Russell Sage Foundation	Jane Ribadeneyra, Legal Services Corporation	Christina Thompson, The California Endowment
Christine Kudrav, Bloomberg Philanthropies	Jenny Morgan, Robert W. Woodruff Foundation	Jessica Richards, William Penn Foundation	Kyrstin Thorson Rogers, Proteus Fund
Emily Kuhn, Bill & Melinda Gates Foundation	Linda Musumeci, American Philosophical Society	Yadira Rivera, First Nations Development Institute	Lisa Torres, The Coleman Foundation
Liza Lagunoff, The New York Community Trust	Elizabeth Myrick	Timothy Robinson, Lumina Foundation for Education	Rafael Torres, United Arts of Central Florida
Tracy Lamparty, Jay and Rose Phillips Family Foundation of Minnesota	Ashley Navarre, Baptist Community Ministries	Donald Roeseke, The Rockefeller Foundation	Brooke Treadwell, The William and Flora Hewlett Foundation
Nicole Larsen, The Ralph M. Parsons Foundation	EG Nelson, Blue Cross and Blue Shield of Minnesota Center for Prevention	Kelli Rojas, Rose Community Foundation	Rikard Treiber, Peter G. Peterson Foundation
Paula Lentoni, Mott Philanthropic	Jessica Nelson, Chinook Fund	Gary Romero, Virginia G. Piper Charitable Trust	Rebecca Van Sickle, 1892 Consulting
Adam Liebling, The Robert Wood Johnson Foundation	Lucy Nguyen, S. D. Bechtel, Jr. Foundation	Frank Rybak, Missouri Foundation for Health	Blanch Vance, The Annenberg Foundation
Marla Lopez, Open Society Foundations	Tim Niyonsenga, Michigan Health Endowment Fund	Silvia Sanchez, Fidelity Charitable	Amanda Vragovich, National Endowment for Democracy
Martine Louis, Fund for Global Human Rights	Beth Norris, Bush Foundation	Sheiron Sanchez, Sisters Health Foundation	Cassandra Wagner, The William and Flora Hewlett Foundation
Catherine Luce, Maine Health Access Foundation	Ericka Novotny, Arcus Foundation	Adam Sanders, The Leona M. and Harry B. Helmsley Charitable Trust	Jane Ward, Eugene & Agnes E. Meyer Foundation
Hope Lyons, Rockefeller Brothers Fund	Suki O'Kane, Walter and Elise Haas Fund	Nicole Saunders, Connelly Foundation	Nicholas Wenham, Peter Kiewit Foundation
Jody Marshall, Meyer Memorial Trust	Abigail Opoku-Agyemang, The Starr Foundation	Anne-Marie Schaaf, John Gogian Family Foundation	Shantelice White, Bainum Family Foundation
Kelly Martin, The James Irvine Foundation	Kaitlin Ostlie, InFaith Community Foundation	Dan Schoenfeld, Fluxx	Dorothy Wickens, McKnight Foundation
June Matayoshi, Irving Harris Foundation	Wendy Pedowitz, Wellspring Philanthropic Fund	Kristine Schultz, Interact for Health	Joanna Willis Cabral, Annie E. Casey Foundation
Melanie Matthews, Champion Advocacy Fund/Campion Foundation	Heather Peeler, ACT for Alexandria	Deena Scotti, Missouri Foundation for Health	Rylanda Wilson
Symone McClain	Christopher Percopo, The Leona M. and Harry B. Helmsley Charitable Trust	Jessica Shao	Arlene Wilson-Grant, Disability Rights Fund
Marc McDonald, AARP Foundation	Miyesha Perry, Morris & Gwendolyn Cafritz Foundation	Suzanne Shea, Ford Foundation	Mallory Womble, American Jewish World Service
Marcus McGrew, The Kresge Foundation	Danette Peters, Onyx Consulting	Anela Shimizu, Hau'oli Mau Loa Foundation	Esra Yarar, Fund for Global Human Rights
Kerry Medek, GHR Foundation	Erin Peterson, The Klarman Family Foundation	Ada Slagis, Grand Victoria Foundation	
James Mendez, The Robert Wood Johnson Foundation	Dorothy Pflager, Foundation for Child Development	Tashie Sloley, Borealis Philanthropy	
Celene Meyer, Episcopal Health Foundation	Hannah Rabalais, Kleinert Foundation	Stacey Smida, Cargill	
	Tamara Radcliffe, Sobrato Family Foundation	Jasmine Smith, American Jewish World Service	
		Ursula Stewart, New York State Health Foundation	
		Kristen Summers, Saint Luke's Foundation	

