



Creating the Future  
**TOGETHER**

 **PEAK**  
Grantmaking  
2017 Annual Report

As we outlined in our 2017-2019 strategic plan, PEAK Grantmaking has mapped out key milestones toward our ultimate destination—ensuring philanthropy has grantmaking practices in place that maximize its impact on the people and causes served. This is our way of achieving the vision of an equitable world, in which people have the resources and opportunities to thrive.

Under this strategic plan, we committed to:

Improve how grants get made, connecting grantmakers' values to their practices, prioritizing impact and outcomes over administration, and reducing costs for both grantmakers and grantseekers.

Ensure that grantmaking practices, and the people who manage them, are recognized for what and who they are—integral components of and contributors to grantmakers' success.

Deepen the expertise of grants management professionals so you can lead your organizations in the adoption and implementation of effective practices.

PEAK Grantmaking has made great strides toward these goals and it is our pleasure to share our progress with you in this 2017 Annual Report.



## Improving Practices

*PEAK Grantmaking helps grantmakers create the practices they need to better partner with grantseekers and the people they serve.*

In 2017, PEAK Grantmaking articulated a vision to empower grantmakers as they and we work to create a more equitable world. In addition to focusing on effective practices in the field, we began to emphasize the alignment of practices with values, where grantmakers lean into and live their values by having those values show up in the practices they use to make grants. This focus allows grantmakers to better execute their processes by providing clearer guidelines and a more robust understanding of what's required to fulfill the mission at hand. Values-based grantmaking ensures a better experience for grantmakers and grantees alike.

PEAK Grantmaking started this process by initiating field-wide conversations on how best to align a grantmaking organization's practices with its values. We also incorporated this into many of our learning opportunities, which were well-received by our members. Eighty-seven percent of members who participated in these learning opportunities plan to use what they learned to improve practices and values alignment in their respective organizations.





## Building Experts & Leaders

*PEAK Grantmaking is the only place grantmakers can gain grants management expertise that equips them as leaders and change agents in their organizations. Our work is elevating philanthropy, creating the next generation of leaders in the grantmaking profession.*

Our members recognize PEAK Grantmaking's value in the marketplace, with 75 percent maintaining their membership for three years or more—a statistic that far outpaces industry standards for membership retention. In 2017, we continued to examine how we connect grantmakers with the resources they need in order to improve their learning and increase our visibility in the field.

In order to accomplish this goal, we broadened our study of how to best meet the people we serve. Grantmakers wear many hats and need learning opportunities that are accessible, flexible, and practical for themselves and their organizations. We used this challenge as our inspiration, creating a comprehensive learning experience that's paved the way for grants professionals to advance their careers while making a greater impact on the areas of mission in which they serve.

PEAK Grantmaking is the profession's leader in providing relationship-focused learning. After all, grantmaking isn't just about the dollars used to fund programs. It's about the people who'll benefit from the outcomes of those dollars and programs. We applied this people-focused approach as we developed our online learning platforms, **CONNECT** and **LEARN**.

In its first full year of operation, the **CONNECT** discussion community was used by 37 percent of our membership. The number of posts in 2017 increased by 75 percent over 2016. We'll devote more of our efforts to growing this area of our learning platform in 2018.

**LEARN**, our online learning portal, gives grantmakers the opportunity to enhance their skills in a convenient, learner-centric way. 2017 brought an 11 percent increase in unique participants for our webinars and contributed to

organizational sustainability with a 15 percent increase in revenue from just this part of our learning program. And the content we provide is well-received by those who consume it: an overwhelming majority of 95 percent of webinar attendees rated our sessions as "Good" or "Very Good" on their evaluations.

Using the content in **CONNECT** and **LEARN**, we have engaged members, providing them the information they need to improve practices, and creating more efficiencies within their organizations, all while giving them the chance to network with other professionals in the field no matter where they are in the world.

In-person workshop attendance surpassed our 2017 goal. We also welcomed 617 attendees to Annual Conference in Hollywood, California. This conference remains the world's largest assembly of grants management professionals. Attendees had very positive evaluations of the content and conversation, with 97 percent saying they valued the conference. Eighty-seven percent felt they increased their knowledge and skills by attending and 85 percent stated they'd apply what they learned within their organizations.

As a whole, our members participated in more than 5,000 learning opportunities over the course of the year. We also increased the overall number of our educational programming participants by 38 percent.

Our motivation to position ourselves as the source for just-in-time learning means we'll continue to develop resources in the virtual space to better meet the needs of our members. To this end, we launched a series of online learning modules in February 2018 and will develop additional online learning opportunities as the year progresses.



# Changing Attitudes and Perceptions

*PEAK Grantmaking seized an opportunity to reach out and engage our members and the sector, building relationships and strengthening partnerships with the people and organizations we serve.*

In 2017, we embarked on a mission to promote the strategic value of our members and the critical importance of effective grantmaking practices in a more effective and compelling way.

Our rebranding was the most visible sign of this initiative, but this was more than just a new name, logo, and tagline. It marked our commitment to becoming more visible, more vocal, and more valuable with and to our members and others in the philanthropic sector. The change was warmly welcomed by a large majority of our members and we learned a great deal by listening to those who shared their feedback with us. Once the rebranding's rollout was complete, we could confidently say we achieved our overall goal of creating greater visibility through an authentic, unified presence. And the numbers tell the story: We gained 715 new members in 2017, far surpassing our goal. Even more importantly, member engagement increased.

Though member engagement encompasses many touchpoints, we believe that certain components of our outreach plan were particularly effective. We redoubled our efforts on social media to spread the word about our rebranding and to engage our members in regular conversation. The work paid off, netting a 19 percent increase in Twitter followers and an 81 percent increase in blog readership in 2017.

Other networking opportunities realized gains as well. Instances of participation in our Regional Chapters grew by 20 percent more than 2016. Evaluations showed that 91 percent of those who attended a Regional Chapter event were satisfied and 92 percent found the content relevant to their individual jobs.

Overall, members are finding a renewed sense of energy through our transition to PEAK Grantmaking, take big steps with us and implementing strategic solutions that demonstrate their skill and expertise.





# Improving the Grantmaking Experience

*Our emphasis on grantmaking practices has one overarching goal: to improve the grantmaking experience.*

Talk to anyone who requests funding from grantmakers and you'll hear the same story: Grantseekers are spending more time and more resources on applications and reporting. While no one questions the importance of these two tasks, it's also indisputable that time spent on administration is time taken away from the missions, objectives, and outcomes of the funded projects. Where's the balance? Are there tools to help grantseekers and grantmakers work through the process more efficiently? Starting with Project Streamline in 2008 and continuing through our work on values-based grantmaking in 2017, PEAK Grantmaking believes the grantmaking experience can be positive and position all involved for greater success.

Effective practices create greater efficiencies—a win-win scenario for all parties. In 2017, 4,000 instances of education were delivered on the topic of effective practices, leading 1,784 participants to state that they planned to change their practices. This represents a 14 percent increase over 2016. We're excited to see how this knowledge is put to use and to hear how it impacts the process for both grantmakers and grantseekers.

Part of the future we're creating includes weaving diversity, equity, and inclusion into all our work. We began with a focus on ourselves, incorporating racial equity performance and training into our professional competency model and delivering training to increase familiarity among our own board and staff. This strong foundation will enable us to facilitate similar training for 500 grantmakers by the end of 2019.

Continuing with our members, we plan to collect data to better understand diversity in our ranks. Additionally, we'll share information with grantmaking organizations on how to attract more diverse job candidates. Our goal for 2019 is to have 160 grantmaking organizations use a new toolkit with 20 percent hiring a diverse candidate to their staff.

PEAK Grantmaking has also started to lead the way in the adoption of standards for DEI demographic data collection—what it is and how it should be collected and used by grantmakers seeking more equity in philanthropy. We anticipate releasing the results of our demographic data collection study in the first half of 2018. Our goal is to secure commitments from 100 grantmakers to collect data and adopt use standards by 2019.



Each goal we have articulated advances PEAK Grantmaking's vision of an equitable world where people have the resources and opportunities they need to thrive and continues the critical conversation about ensuring philanthropy has grantmaking practices in place that maximize its impact on the people and causes served.



