Strengthening the Network for Grantmakers:

2016 Annual Report
PEAK Grantmaking (formerly Grants Managers Network) is a thriving national organization by grantmakers for grantmakers. We are dedicated to increasing the knowledge, efficiency, and effectiveness of philanthropic organizations. Our mission: to advance grantmaking so that grantmakers and grantseekers can best achieve their missions. PEAK Grantmaking gathers and curates resources, creates learning opportunities, and fosters dialogue and collaboration around grantmaking practices across the philanthropic spectrum.

PEAK Grantmaking is where Practice Meets Purpose. Our research, resources, and training have helped reduce the costs of making grants for both grantmakers and grantseekers, strengthened compliance and controls, improved transparency, encouraged grantmakers to listen to grantseekers, and increased the ability of funders to measure impact.

By increasing the knowledge of grants managers and the efficiency of funders, PEAK Grantmaking helps grantmakers deliver more resources directly to mission-driven activities, leading to better outcomes for grantmakers and grantseekers alike.

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OVERVIEW

In 2016, PEAK Grantmaking concluded work on an ambitious three-year (2014-2016) plan to help grants management professionals and their organizations ensure their grant dollars deliver powerful results.

Over the past three years, we invested in innovative efforts to maximize philanthropy’s impact by:

- Accelerating the adoption of proven practices that bring added effectiveness, efficiency, and transparency to grantmaking.
- Advancing the knowledge and expertise of grants management professionals so they can lead their organizations to better outcomes.
- Connecting members and their organizations with colleagues across the field to enable them to learn from each other and collaborate to advance the sector.

We also invested in transformational capacity building, including increased staffing, enhanced technology, and a new business model to ensure the long-term sustainability of our organization.

We are pleased to present this report of our 2016 accomplishments towards these goals and summary of our achievements against our 2014-2016 strategic plan.
EFFECTIVE PRACTICES

Grantmaking includes three primary components: what, who, and how. Most grantmakers pay attention to what they fund—program areas and impact—and who they fund—the grantees they support. But what about how they 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. We believe that as funders become more efficient in their grantmaking practices, both grantmakers and grantseekers will be able to shift more resources from administrative to mission-related activities.

PEAK Grantmaking’s Effective Practices goal from 2014 to 2016 was to accelerate the adoption of proven practices that bring added effectiveness, efficiency, and transparency to grantmaking.

Our Effective Practices work was organized under three strategies:

- **Evaluating practices** by helping grantmakers identify where they can improve their grantmaking and creating mechanisms for measuring and monitoring the overall state of practices in the field.
- **Changing practices** by expanding training, tools, and resources that help grantmakers improve practices.
- **Elevating practices** by advancing the importance of grantmaking practices and the grants management profession to philanthropy’s success.

**Evaluating Practices**

Grantmakers often make decisions about their grantmaking practices without information from stakeholders or a complete understanding of their own current practices. PEAK Grantmaking worked to bring greater focus on feedback and evaluation as a hallmark of effective grantmaking through:

- Creating and promoting the *Assessing the How of Grantmaking* guide, which identifies five core questions every grantmaker should be able to answer about how it makes grants, recommends indicators of effective practices, and provides advice on how to find and present the results. The guide was downloaded almost 950 times from 2014 to 2016, making it the second-most-downloaded publication in our library. We offered training on the guide’s content via webinars, at regional meetings, and at our annual conference. These efforts reached more than 250 grants managers. In 2016, we featured the guide as a tool for evaluating critical organizational questions in our *Successful Structures* series.
• Developing the EPIcenter (Evaluating Practice Improvements center), the first ever data collection tool to document current practices and track changes in practices over time. Grantmakers can use the tool to benchmark their practices against peers and locate resources to strengthen their grantmaking. Ultimately, PEAK Grantmaking will set benchmarks for as many practices possible, so funders can not only compare themselves to peers, but also understand the ideals in grantmaking practices. We launched the EPIcenter in March 2016. By year end, close to 140 grantmakers had shared their practices in the EPIcenter. We will work on expanding participation in the EPIcenter in 2017 and beyond.

Changing Practices

PEAK Grantmaking continued to build on the success and lessons learned from Project Streamline to tackle enduring barriers to highly effective practices. Between 2014 and 2016, members reported that PEAK Grantmaking helped refine approximately 3,700 practices—almost 1,400 in 2016 alone. We concentrated on streamlining, data intelligence, integrating technology into grants management, and compliance issues.

In 2014, we continued to raise awareness about streamlining practices by incorporating the standalone projectstreamline.org website into our main website. (This move helped underscore PEAK Grantmaking’s role in this successful effort.) We also organized Project Streamline guides into a toolkit that we promoted at conferences, online, via blogs, and through Twitter. From 2014 to 2016, the toolkit was downloaded more than 925 times, and Twitter followers for @projstreamline increased by 63 percent to more than 450.

PEAK Grantmaking’s 2015 Attitudes and Perceptions Research confirmed the need for us to help prepare grants managers as their roles evolve from tracking data to interpreting and sharing it. Seventy percent of non-grants-management respondents to the survey said, “using and interpreting data more effectively” was the one thing grants managers could do to contribute to their organizations’ goals. In 2016, we delivered 980 instances of training through our webinar series and conference track on data intelligence, expanding members’ skills in data analysis, data visualization, and framing questions that data can answer. At our 2016 conference, we launched our Data Boot Camp designed to strengthen members’ ability to apply data within their organizations. The workshop reached a capacity audience of approximately 50 participants, 88 percent of whom said they planned to improve their grantmaking based on their new knowledge.

Compliance remains a core competency for grants managers, so we continue to stress compliance education for our members. Between 2014 and 2016, PEAK Grantmaking delivered almost 3,850 instances of compliance education. Those figures represent 9 percent growth from 2014 to 2015 and 19 percent growth from 2015 to 2016.

Our five-year Project Streamline evaluation identified “online systems that work” as the number one “practice that matters,” leading us to continue to focus on the smart integration of technology into grantmaking. In May 2016, we partnered with the Technology Affinity Group and Idealware to update A Consumers’ Guide to Grants Management Systems. Within seven months, grantmakers had downloaded the report more than 2,600 times. Also, last year, PEAK Grantmaking delivered approximately 980 instances of technology-related training—more than three times the instances of training delivered in 2015—through webinars, regional meetings, and annual conference sessions.
Elevating Practices

As largest membership association in philanthropy and the organizing body of the grants management profession, PEAK Grantmaking promotes the profession to the philanthropic sector. Project Streamline was PEAK Grantmaking’s first field-wide change effort and its success raised awareness of the importance of practices, the correlation between practices and successful grants, and PEAK Grantmaking’s role in promoting this relationship. However, we continue to see a disconnect between grantmaking professionals’ view of the value of practices and contribution of grants managers, and the field’s view of practices and grants managers.

Our 2015 Attitudes and Perceptions Research confirmed that much more needed to be done to promote parity among the three functional areas of grantmaking: practices, programs, and relationships. (The 2015 research will form a baseline for measuring progress towards changing attitudes and perceptions over time.) When practices are viewed as integral to strategy better grantmaking happens. So, PEAK Grantmaking worked (and continues to work) to champion the value of practices, and the people who manage them, to decision makers at grantmaking organizations as well as to colleagues across the field.

Our Attitudes and Perceptions Research also informed the following programs and initiatives:

**Successful Structures**, a series of case studies on moving grants management to the forefront of strategy at grantmaking organizations. The Successful Structures introductory publication was downloaded nearly 230 times. We followed that resource with two of four planned case studies (the other two were delivered in 2017). We also developed a workshop for regional chapters, which reached about 235 participants.

Increasing our visibility in the field. PEAK Grantmaking set targets for presenting and exhibiting at colleague events to promote the value of practices and the profession beyond our membership. We participated in nine events in 2016. We also increased visibility of the grants management profession through our participation—and our encouragement of members’ participation—on social media.

Expanding collaborations with key partners.

Between 2014 and 2016, we engaged with 18 national organizations—including the Center for Effective Philanthropy, Exponent Philanthropy, and the Forum of Regional Associations of Grantmakers—as well as with numerous regional associations of grantmakers.

Continuing our thought leadership program. Launched in 2014, the project develops our members’ thought leadership through training, peer-to-peer learning, and platforms on which to share their perspectives. Twenty-one members have participated in the program since its launch.

Publishing eight issues of our online journal GMNsight (now PEAK Insight Journal), the only publication about grantmaking practices produced by a philanthropy-serving association. In 2014, LearnPhilanthropy named our journal one of its top sources of learning about the field. Between 2014 and 2016, the journal generated more than 7,000 total views and exceeded our goal of an average of 500 views per issue. Issues focused on topics including “fringe” philanthropy, collaboration, and streamlining.
Our goal of advancing the profession also led to a decision in 2016 to adopt a new name and tagline, which we implemented in 2017. We concluded that changing the name of the organization championing the profession would signal the need for a change in attitudes and perceptions towards grants managers and grantmaking practices. We viewed our name change as another step toward ensuring that professionals managing grants are recognized for the leadership they contribute to their organizations and the impact they make on the nonprofits their organization’s support. The new name, PEAK Grantmaking, reinforces the strategic value of grants management professionals and practices. It reminds the field of the evolution of our profession and its increased importance. It also more closely ties our brand to our mission—to advance grantmaking in service of philanthropy that makes a stronger impact on the public good.

Knowledge and Expertise

Grants management is a distinct profession that requires specific knowledge, skills, and abilities. As more grantmakers realize the connection between practices and outcomes, and share more about their work, their need for experts to guide this work will increase. PEAK Grantmaking prepares grants managers not only to meet their organizations’ current grants management needs, but also to anticipate their organizations’ future needs.

PEAK Grantmaking’s Knowledge goal for 2014 to 2016 was to advance the knowledge and expertise of grants management professionals so they can lead their organizations to better outcomes.

PEAK Grantmaking delivered almost 9,025 instances of learning from 2014 to 2016, with nearly 4,000 taking place in 2016 alone. More than 2,550 individuals participated in PEAK Grantmaking learning activities between 2014 and 2016—with 1,380 people participating in just 2016.

More important than the numbers of learning instances and people served was the value they received from what they learned. Participants reported the following results for 2016:

- **96%** overall satisfaction with their learning opportunities (compared to 95 percent in 2015 and 93 percent in 2014)
- **94%** learned something (compared to 88 percent in 2015 and 90 percent in 2014)
- **80%** will apply that learning to improving grantmaking at their organizations (compared to 77 percent in 2015 and 79 percent in 2014)

To achieve these impressive results, we concentrated our work in three areas: content, connection and community, and channels.
Content

PEAK Grantmaking expanded its capacity as a creator and curator of learning content. We added staff experts in adult learning to establish an integrated set of learning resources and opportunities that would enable members to master the knowledge they need and learn about emerging issues in the field of grants management.

- Hired an experienced Content Manager who already has:
  - Curated more than 500 pieces of specialty content for grants managers.
  - Developed 18 instances of new, online programming set for release in 2017 with features including a knowledge check, certificate of completion, and links to related resources for members seeking a ‘one stop shop’ on a particular topic.
  - Hired an experienced Education Programs Manager to lead PEAK Grantmaking’s Annual Conference content development, webinar programming and workshops.

Connection and Community

PEAK Grantmaking transformed its online community into a learning portal where members can:

- Identify specific professional needs and areas for future development.
- Find resources and people (both inside and outside of PEAK Grantmaking) to achieve their learning goals.
- Engage in peer-to-peer learning and knowledge sharing
- Track progress and report accomplishments to their organizations.

Channels

Between 2014 and 2016, PEAK Grantmaking expanded its learning channels so members can learn in the ways that work best for them. In addition to strengthening existing channels—our webinars, workshops, publications, and annual conference—we piloted live streaming events and created the infrastructure for the launch of online courses in 2017.

PEAK Grantmaking implemented the new learning portal in early 2015. Initial adoption of the new platform was slow due to software issues. We addressed those issues by year end, replaced our old association management system the following year, and by October 2016 had debuted a new online forum, Connect, which exceeded expectations and re-engaged our members. In fourth quarter of 2016, 295 members posted more than 1,000 comments.

This learning portal also supports the business side of PEAK Grantmaking’s Learning Program, generating revenue that moves our learning programs to self-sufficiency.
Membership

At its heart, PEAK Grantmaking is an organization by and for our members. Our membership programs are designed to engage grant managers with PEAK Grantmaking, with each other, and with the profession. Our regional chapter programs provide local peer-to-peer educational, networking, and engagement opportunities. None of the work we do would happen without the enthusiastic and enduring participation of hundreds of volunteers who make the annual conference, regional activities, and much more possible.

Our 2014 to 2016 Membership goal was to expand our network by connecting members and their organizations with colleagues across the field to enable them to learn from each other and collaborate to advance the sector.

To accomplish this goal, PEAK Grantmaking pursued four strategies:

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**Growing membership.** Between 2014 and 2016, we added close to 450 new members (net), growing membership by 12 percent to more than 3,500. Our 84 percent member retention rate ranks among the top bracket of associations (MGI Membership Marketing Benchmarking Report, 2012-2016). The primary reason members leave PEAK Grantmaking is that they move to jobs outside the field.

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**Increasing member engagement.** The true measure of PEAK Grantmaking’s success is the value we provide to our members, as evidenced by member engagement. Unfortunately, between 2014 and 2016, we experienced an 8 percent decrease in the percent of members actively engaged with PEAK Grantmaking. We attribute this decline to issues replacing our technology infrastructure, which prevented members from accessing many online engagement opportunities. With the technology replacement finished, we will work hard in 2017 and beyond to re-engage grants management professionals and expand our membership. We will add to our membership staff to accomplish that.

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**Expanding participation in regional chapters.** We grew member participation in regional chapters by 2 percent, to 535 professionals, from 2014 to 2016. We will add a dedicated staff person in 2017 to help our regional chapters strengthen programming and increase engagement.

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**Developing leaders and volunteers.** Members gain more than an opportunity to contribute to the field through volunteering. In the 2016 volunteer survey, 83 percent of respondents reported that volunteering with PEAK Grantmaking gave them new or enhanced skills that improved their job performance or organizational effectiveness. That year we engaged about 225 volunteers in annual conference planning, regional chapter management, board service, advisory groups, and projects such as the EPIcenter and Connect.
Transformational Capacity Building

Entering 2014, PEAK Grantmaking had experienced a long period of considerable growth in membership, but much smaller growth in revenue. The pace of revenue growth made it possible to maintain our programs and services, but didn’t allow us to accumulate the large, upfront investments needed to expand our capacity—specifically staff and technology—and scale our programs to meet member needs.

This investment has allowed us to:

- **Successfully transition to a new business model** that we believe will ensure the long-term sustainability of PEAK Grantmaking. This included new revenue streams as well as higher dues levels and a fee structure for programs historically available for free. Annual dues payments from organization members increased by about 5 percent between 2014 and 2016, with about 17 percent of all organizations tied to PEAK Grantmaking participating as dues-paying members. There remains significant potential to recruit additional dues-paying member organizations, and we will add dedicated staff to our membership team in 2017 to work on cultivating organization members. The introduction of fees to cover programming costs resulted in decreased participation in 2015, but participation rebounded in 2016. As a result, webinar participation grew 21 percent and regional meeting participation grew 2 percent from 2014 to 2016. This indicates that members have accepted this new model.

- **Add six staff positions** between 2014 and 2016, building out our education, membership, and communications and practices teams. We also hired a COO to manage the expanded organization and enable the Executive Director to serve in a more external-facing role. For more information on the positions and people hired, visit peakgrantmaking.org/staff.

- **Replace our technology infrastructure**, including our association management and learning management systems. This project faced significant challenges in both selecting and implementing systems that would meet our needs. Our original timeline put completion in 2014. The final system components went live in October 2016. The impact of this commitment of staff time and resources was significant and affected many elements of our work. For example, PEAK Grantmaking had planned to release online courses in 2016, but had to delay the launch to 2017 when the technology was able to support them.

The positive news is that we are entering our 2017-19 plan with systems that support our programs and business model. Now we can transition from capacity building to program delivery moving forward.
What’s Next: 2017-2019 Plan

In 2016, the PEAK Grantmaking board approved a three-year strategic plan that will take us to a new level of service to members and leadership in the sector by 2019. Over the next three years, PEAK Grantmaking will help philanthropy maximize its impact by:

- Bringing more consistency to grantmaking, connecting grantmakers’ values to their practices, prioritizing outcomes over administration, and reducing costs for both grantmakers and grantseekers.
- Highlighting grantmaking practices and grants management professionals as the integral components of a grantmaker’s success that they are.
- Deepening the expertise of grants management professionals so they can implement superior grantmaking practices.

For more information on the 2017-2017 plan, visit drivingthefuture.peakgrantmaking.org.

Conclusion

PEAK Grantmaking strengthens practices, powers knowledge, and broadens collaboration to help philanthropy realize its full potential to fuel change for good. We thank you for your engagement with us on our journey so far. We look forward to your continued participation in our vibrant community of grantmaking practice as we advance leadership and learning across the sector.