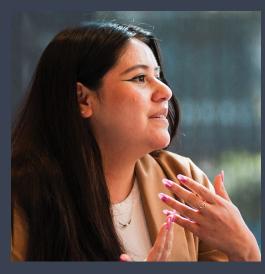


2023 Impact Report



















Yielding is not an option if we want to undo the systemic damage that keeps people from opportunity and abundance. At PEAK Grantmaking, we believe that spurring philanthropy to drive toward racial equity and make transformational shifts to better serve disadvantaged people and communities begins with us.

For PEAK, 2023 was a year of organizational growth and evolution. We advanced along our equity journey, leaned into the practice of emergent learning, sharpened our strategy, and deepened our commitment to be a people-centered workplace.

"We are the ones we've been waiting for."

At PEAK2023, we lifted up these words by June Jordan from the mainstage and took them to heart, calling our community to action to help us realize our bold aspirations to become a truly next-level nonprofit.

We aspire to set a bold example for the sector. This past year, our staff and board spent significant time ensuring that we model what we espouse for the field, which includes being emergent learners together and centering equity in all we do. Guided by our Principles, our growing staff is generating and operationalizing big ideas and new ways of living and working using inquiry and introspection as a tool for identifying where equity and effective practices could use some special attention.

This past year saw us making strides in building the tools needed for members of our community to advocate for themselves as change agents, champion and amplify issues and policies that better serve people and our sector, and help us to discern opportunity gaps where PEAK can lead. And we stayed intensely focused on advancing equity and moving away from scarcity mindsets to mindsets of abundance, putting possibilities at the center of our approach to our mission instead of dwelling on limitations. As emergent learners and leaders, we are committed to listening deeply to you to identify our shared aspirations—and how PEAK can best help to meet them—and transparently sharing our vision for realizing those goals. In this spirit, PEAK in 2023 adopted an objectives and key results (OKR) framework as an outcomes-oriented, accountabilitybased roadmap for our team. Through a collaborative process between our staff and board, we identified three guiding objectives supported by a set of key results, which guide the development of our plans and provide measures to track our progress and impact:

- Catalyze a movement to advance equitycentered, values-driven grantmaking practices.
- Grow and empower a membership network of change agents who advocate for equitable grantmaking practices, both inside their organizations and sector-wide.
- Be a next-level nonprofit, building robust infrastructure, ensuring sustainability, and nurturing a culture where our people thrive.

As headwinds continue to shift in ways that seem to push philanthropy away from racial equity, fairness, trust, and truth, there is far more work and innovation needed to shift the core operational stances of funding institutions. Equity matters. Inclusion matters. You matter. On behalf of PEAK's staff and board, thank you for being an essential part of our community and for your contributions to our collective efforts.

We offer this report on the past year to lift up our story of progress in strengthening our organization and advancing our mission. We need your participation and investment to continue moving this work forward, and hope that you will deepen your commitment to supporting PEAK in 2024. Looking ahead, we are eager to continue our journey, inspired by the call to action we introduced at our annual convening: Let's make 2024 a year of reimagining.

With appreciation,



Satonya Fair, JD she, her, hers President and CEO, PEAK Grantmaking



Ify Mora she, her, hers

Managing Director, Program Operations, Margaret A. Cargill Philanthropies PEAK Grantmaking 2023 Board Cochair



Miyesha Perry she, her, hers

Director of Grants Management, Kenneth Rainin Foundation PEAK Grantmaking 2023 Board Cochair

Our vision

Realizing the full potential of philanthropy to drive equity and opportunity.

Our mission

Transforming philanthropy by elevating the field of grants management and empowering grants professionals to lead the way in operationalizing equity-centered, values-driven grantmaking practices.

Our purpose

We believe in principled grantmaking practices that align funders and nonprofits as equal partners in advancing their respective missions and strategic objectives. Narrowing the power gap and ensuring that funders live their values through their grantmaking practices will result in positive change for the causes and solutions we seek to collectively advance.

Our strategy

PEAK's strategic framework with four anchors defines our goals to guide our work in the years ahead.

- From Grants Management Professional to Change Agent for Equitable Practices
- Emergent Learning Community as Core Philosophy
- New Models for Growth and Sustainability
- Strategic Partnerships Extend Reach
 and Influence

Our values

To accomplish our mission and realize our vision, we base our decisions and actions on these core values: Community, equity and inclusion, integrity, learning, partnership, and transparency.

Learn more at: peakgrantmaking.org/about-us





PEAK membership expanded in both scale and breadth in 2023, reflecting an ever-growing commitment to join our community of change agents.



Over the past few years, our network has evolved into a diverse array of philanthropic institutions and professionals, consultants, philanthropy-supporting organizations, and other allies who are aligned with our values and vision to transform philanthropy.

Guided by our continued focus on lifting up and empowering the strategic function of grants management, PEAK welcomed sector professionals in 2023 representing an expanding range of roles and functions. Today, we represent a community of peers across the country who are dedicated to advancing transformative, equitycentered grantmaking practices within their institutions and across the sector.



people in our membership *up 13% over 2022* with 1,559 new people





"I start every morning with PEAK. I look forward to daily information, questions to explore, and community responses that are right on target for what I'm seeking."

Monica Thorns, Grants Manager, Christopher Family Foundation



contributing Organization Members *up 5% over 2022* with 63 new members

"I've met amazing leaders dedicated to improving grantmaking processes. I have grown both personally and professionally and have made friendships that will last a lifetime. I can always count on the PEAK community to lend an ear, provide a resource, and share successes and challenges in a welcoming environment."

Tara Havlicek, Program Manager, Mitsubishi Electric America Foundation



"I am so inspired and energized by the PEAK community. We've made incredible progress, and I have so much hope for the future knowing that others in the grants management and broader philanthropy community are working as change agents from wherever they sit."

Kelli Rojas, Vice President, Operations, Rose Community Foundation









PEAK is enabled to pursue our mission and vision thanks to the investments of our community.

In 2023, we saw another year of contributing membership growth thanks to the funding institutions that joined and renewed their memberships and provided additional general operating support through increased membership dues, contributions, and grants—nearly doubling PEAK's membership revenues over the past five years. We are also grateful for the generous support from the companies that sponsored our annual convening and programs, and from our individual supporters. "For Borealis, PEAK is more than a grantee partner. It is the definitive resource for funders who want to do their jobs well. PEAK's five Principles both meet you where you are and propel you toward how we should approach our roles in philanthropy."

Bianca Carter, Interim Director, Racial Equity Initiatives, Borealis Philanthropy



invested in PEAK through membership dues and contributions, grants, sponsorships, and donations









"Supporting PEAK allows the Bezos Earth Fund to engage with a community of the best and brightest like-minded professionals. We continually use PEAK trainings, workshops, conferences, and resources to enhance the skills and knowledge of our organization's staff and build partnerships that benefit our organization."

Dan Schoenfeld, Director, Grants Management, Bezos Earth Fund

"We continuously look for ways to implement efficient, equitycentered, and values-driven grantmaking, and PEAK has been a big part of our journey. Investing in and partnering with PEAK keeps us connected to valuable resources, and we stay informed on emerging trends and best practices in the field that have been invaluable to us and our grantee partners."

Tanisha Davis, Vice President, Grant Operations and Planning, Archstone Foundation

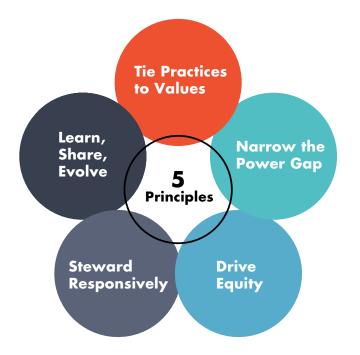






Five years in, PEAK's Principles continue to serve as a bright guiding light for advancing values-driven, equity-centered grantmaking and organizational practices, fueling a movement for sector transformation.

Launched in 2019 with the publication of the white paper *Courage in Practice*, interest and engagement in learning about and applying our five Principles for Peak Grantmaking has skyrocketed—white paper downloads more than doubled in the past year alone. And we continue to illuminate the Principles year-round—with a clarion call to lead practice change—through a growing collection of resources, our cohort-based learning initiatives, at our annual convening and peer network gatherings, in publications, through our partnerships, and in sector engagements.



31,576

all-time Principles white paper downloads with 16,178 downloads in 2023 alone, up 175% over 2022

46,203

resource downloads up 30% over 2022





"PEAK's Principles for more equitable and trust-based grantmaking practices have been invaluable. I point to them when advocating for change at my organization from loosening restrictions to creating less onerous processes. And because of PEAK's rigorous practices and reputation, I'm able to reassure leadership and show them that these ideas are supported by the field."

Patrick Taylor, Director of Grants Management, Sobrato Family Foundation



"PEAK's Principles have been instrumental in helping us tie our practices to our values of equity, integrity, humility, and dedication. In addition to guiding us in revising our indirect expense policy to contribute to the sustainability and overall effectiveness of our partners, they helped us to embark on a journey to work with partners who mentor us to become a trusted antiracist institution."

Deena Scotti, Vice President of Program Administration, Missouri Foundation for Health

Continuing the build-out of tools and insights to help members put Principles into practice

In 2023, we released a set of Steward Responsively resources, calling on grantmakers to reframe risk and recalibrate their vetting process to make it more transparent, more trust-based, more nonprofit-and community-centered, and less burdensome. The collection featured an action planner and three how-to guides exclusive to Organization and Consultant Members—that delve into the key action steps, guiding questions, and additional resources.





INSIGHTS The Myth of Risk: Fear not the dragons, funders

by Satonya Fair

"As an Organization Member, we have benefitted so much from the Steward Responsively and Learn, Share, Evolve resources. Combined with insights from the wider PEAK community, we were able to reassess and update our financial due diligence requirements, rightsizing them for the diverse nonprofit partners we support."



Andrew Brown, Grants & Collaborative Projects Manager, American Red Cross–Community Adaptation Program







The PEAK community convened in-person for the first time since 2019 and met virtually to learn, share, and evolve together.



Our members were deeply immersed in emergent learning and meaningful connection with 7,376 participants joining 102 events—including our annual convening and annual membership meeting, chapter and peer group meetings, cohorts, and community conversations.





A joyous reunion dedicated to learning, sharing, and evolving

PEAK2023—our first in-person convening since 2019 —boasted record-breaking attendance in Baltimore and online. Across the three days, we debuted new ways of gathering that invited attendees to join us on a collective emergent learning journey toward more equitable, effective grantmaking.

"I have never attended a conference where I left feeling so intrigued, inspired, and hopeful about all the learning I experienced."

Mary Cotterman, Grants Manager, BHHS Legacy Foundation

1,223

PEAK2023 attendees, including 949 in person and 274 virtually up 2% over 2022

96%

PEAK2023 attendees would recommend the convening to colleagues



We focused on our Learn, Share, Evolve Principle, by lifting up insights from across the PEAK community and exploring ways that members are leaning into each of our five Principles to be activated change agents for philanthropy. Four diverse keynotes formed the cornerstone of PEAK2023 and focused on building communities of care that empower all people and using the power we have to reshape the practice of philanthropy. We created inclusive and interactive environments that were accessible to in-person and online participants. In-person attendees contributed to our ideation boards and provided a vivid picture of how our community is approaching the implementation of next-level grantmaking practices. In addition, 43 breakouts featured dynamic learning opportunities—like world café and open fishbowl formats—and all of our peer networks, including 14 PEAK chapters and all our peer groups, gathered in person to deepen relationships with their members.

"I came away from PEAK2023 with some powerful takeaways after three days of learning, sharing, and exploring ways of incorporating more effective grantmaking practices with peers across the sector. I am so energized to put what I learned into practice and so grateful I had a chance to build a community in this way!"

Patricia Varela, Grants Specialist, The David and Lucile Packard Foundation



"Our team unanimously found this to be the best gathering of this community to date. We're buzzing with inspiration and ideas to further align our grantmaking practices with our values, center our grantee partners, and drive equity in our grantmaking."

Lynne Bruger, Deputy Director of Grants Management, Wellspring Philanthropic Fund



INSIGHTS The Big Ideas of PEAK2023 in Four Graphics

An abundance of meaningful opportunities to learn with and from regional peers

Our volunteer-led chapters led the way in hosting in-person gatherings, in addition to offering dynamic hybrid meetings. Participation across all 14 chapters grew as members discussed hot topics that included grantmaking trends, demographic data, participatory grantmaking, trust-based philanthropy, and equitable grantmaking strategies. Our chapters also reached exciting growth milestones, with PEAK Midwest reaching the 1,000-member mark and both PEAK Pacific Northwest and PEAK Southeast reaching the 500-member mark.

"I was so glad I could get involved with the PEAK Delaware Valley chapter. In addition to meeting and learning from other members, I helped plan the PEAK2023 chapter meeting and codeveloped an event where we all learned so much about the need to listen and drive relationship building between funders and nonprofit leaders."

Allison Acevedo, Philanthropy Director, National Board of Medical Examiners





participants in 81 chapter meetings down 13% from 2022











"It is hard to sum up the support and love I have received from members and fellow cochairs of PEAK's Black Caucus. I have made lifelong friendships and built a trustworthy network in philanthropy that did not exist for me before this experience."

Shakila Woltz, Grants Management Coordinator, The Robert Wood Johnson Foundation

Our growing and evolving peer groups

In the spirit of emergent learning, PEAK in 2021 formed nine peer groups as a two-year pilot project after receiving feedback from our members that they would like to connect in new ways beyond the geography-based model of our chapters. As part of the pilot, we explored personal-identity-based caucuses, professional-identity-based affinity groups, and communities of practice for Organization Members interested in discussing specific topics connected to equitable, effective grantmaking practice change.

These groups—cocreated with and led by our members—first met at PEAK2021 Online and quickly grew to become affirmational learning communities that are now supported by a growing team. With the pilot ending in 2023, PEAK again listened to member feedback on peer groups by sunsetting the initial communities of practice and launching online discussion forums and virtual town halls, while continuing with our affinity groups and expanding our identity-based caucuses.

1,810

members of one or more peer groups up 40% over 2022

1,377

participants in 25 peer group meetings up 13% over 2021



INSIGHTS Finding Inspiration Within Our Sector and AANHPI Community

by Irene Chansawang

Guiding early careers in grantmaking through Grants Management 101

Through their participation, our 2023 cohort of 119 grants management professionals became better equipped, connected, and inspired to operationalize equity-centered, values-driven grantmaking practices in the philanthropic sector. For the second year, PEAK's revamped virtual learning took the cohort on a journey into the fundamentals of grants management and in-depth discussions facilitated by a diverse faculty of PEAK staff and practitioners. Following each session, they attended small-group convenings led by cohort advisors who are senior leaders in the field, providing opportunities to explore content more deeply, connect with peers, receive coaching, and work towards career growth goals. "I had high expectations going into GM101, and the experience took me to the next level. I now have a shared language and a practiced ability to discuss our work. The course also sparked new curiosities and illuminated new topics for me to dig deeper into independently."

Halle Leganza, Grants Management Associate, Vivo Foundation



CONNECT: Our continuously growing emergent learning space for members

With many funders facing challenges both familiar and new, members reached out to ask questions of their peers and share their insights, resources, and approaches to grantmaking. In 2023, topics ranged from foundation-wide policies and how to build relationships with grantees to the impacts of artificial intelligence and the Supreme Court affirmative action ruling's ramifications for grantmaking.

3,283 CONNECT users *up* 8% over 2022



CONNECT visits up 10% over 2022 "I often turn to CONNECT when I have questions related to grants administration. If my questions haven't already been asked and answered, I know there is a community of people ready and willing to have a discussion. I recently posted about starting a conversation about AI, hoping to connect with a few people-and over 150 responded."

Kristin Pazulski, Grants Administrator, The Louis Calder Foundation

Narrowing power gaps through a service learning program

PEAK and BDO partnered to pilot an innovative program where 20 PEAK members were trained to review and analyze the information found in IRS Form 990 filings and to hold open and respectful conversations with nonprofits. As an extension of our connection to Baltimore via PEAK2023, participants in this pilot were matched with Baltimore-based nonprofits wanting to better understand how foundations assess financial health and what they learn when they review the Form 990. This was done in a shared learning environment where the funder and nonprofit did not have an existing funding relationship in order to lower the barriers of transparent communication that exist when funding is on the table.

After completing the program, 89 percent of nonprofit participants indicated that they were highly satisfied with the opportunities to learn about their Form 990 with funders. In addition, 93 percent of PEAK member participants said that they better understood how to develop transparent and less burdensome nonprofit- and communitycentered financial review processes as a result of the program.





"I was struck by how having a conversation with nonprofit partners about financial health is a gateway to deeper understanding and shared learning, all within the context of organizational health and sustainability."

Kristen Flack, Grants Manager, Arnold Ventures

"The PEAK-BDO training helped me understand what funders might be evaluating when they look at my organization's our nonprofit's 990. Now, I'm more confident that I can answer questions they have about our financial statements."

Katie Sutton, Director of Development, Maryland Volunteer Lawyers Service





PEAK is igniting conversation and ideas that can move the sector forward.

Through our *Journal*, year-round Insights publishing program, communications, and social media, we are lifting up critical conversations and elevating voices from across the sector to illuminate how grantmaking professionals can rethink current practices, live and work by our Principles for Peak Grantmaking, and transform the field of philanthropy to best support our nonprofit partners and the communities we seek to strengthen.





INSIGHTS The End of Affirmative Action: I am shaken but unbowed by Satonya Fair

PEAK's online platforms and channels as places of discovery, support, and connection

Online engagement continues to soar, with an ever-broadening reach, as evidenced by record levels of website activity from new as well as returning visitors. And the analytics provide a peek into the *depth* of engagement—from exploring online resources, to accessing publications and tools, reading PEAK's *Journal* and Insights, signing up for convenings and cohorts, and exploring our job board.

209,799

website visits up 23% over 2022

79,297

website visits from first-time visitors up 17% over 2022

515,086

website pageviews up 23% over 2022



Meeting the moment with *PEAK Grantmaking Journal's* thought leadership on the most pressing issues facing philanthropy today

Since a reenvisioned *Journal* launched in 2019, our member magazine has served as a powerful platform for airing critical conversations and truth telling, lifting up new ideas and challenging the status quo. And our inaugural issue—*Black Voices in Grants Management*—continues to be one of the top-read resources on our website nearly four years after its publication. For our latest issue, released in January

2024, we felt there was a unique opportunity to leverage the *Journal* in a powerful new way: to provide a deep dive into our Learn, Share, Evolve Principle. This extensive suite of articles from grantmakers from across our community—combined with an action planner—offer members an abundance of inspiration and support to answer this three-part call to action and begin driving change in their organizations.

Delivering valued insights year-round

Through weekly articles contributed by practitioners and experts, and by elevating sector thought leadership through our Weekly Reads feature, we lift up stories of innovation and progress from organizations and individuals who are leading change. In addition, our continuing CEO:CEO series brought PEAK's Satonya Fair in conversation with GivingTuesday's Asha Curran and Skillman's Angelique Power in potent idea exchanges that explore philanthropy's evolving role in the social sector and how today's leaders are working to drive change. Insights rank among the top-visited content by PEAK website visitors, affirming our program's value to our community.



INSIGHTS A Call to Action to Fund LGBTQ+ Issues, Movements, and Organizations

by Kelsey Andersen



INSIGHTS How the Rogers Family Foundation Partners Beyond the Grant by Rhonnel Sotelo

The continuing evolution of our social media strategy

In 2023, we took a critical look at our social media platforms—Twitter, now X, and LinkedIn—and made values-driven changes to our program. In light of our escalating concerns about X, we decided to leave the platform. We focused on LinkedIn, where our community of more than 12,000 followers continues to grow and thrive, more than doubling in size over the past two years. We also explored the potential of a PEAK social wall, starting with a pilot at PEAK2023 that drew enthusiastic and growing participation. With this affirmation, we are now exploring options to expand the PEAK social wall into a new space for our community to share and connect during our convenings.

12,061

LinkedIn followers up 72% over 2022







PEAK is uniting with like-minded partners to codesign collaborations that will transform philanthropy, proving that we are stronger together.



Our commitment to strategic partnerships with other nonprofits, funders, and likeminded organizations and companies is a lynchpin of our movement-building strategy. Together, we can accelerate and advance learning—showcasing the expertise and experience of our partners within our member community, demonstrate thoughtful alignments and collaborative thought leadership, and center our grants community as change leaders for the sector. "PEAK is one of our most trusted PSO colleagues and an absolute go-to resource for any funder interested in learning more about effective practices in grants management and strategy."

Jason Born, Senior Director, Knowledge, National Center for Family Philanthropy

Allying with philanthropysupporting organization peers as policy advocates

In 2023, we deepened our commitment to activate as advocates through roles on **United Philanthropy Forum** and **Independent Sector** councils, advisory groups, coalitions, through trainings, and in amplifying calls to action led by partner organizations leading this work —and as a result, we helped inform and mobilize the social sector on key policy initiatives, and legal challenges. "PEAK's insights on equitable grantmaking practices make the Nonprofit Infrastructure Coalition smarter in its work to shape and advocate for federal policies that support nonprofits. We rely on PEAK for a clear vision of what a vibrant social sector must look like and for a compelling advocate's voice as we turn from vision to policy change."

Jeffrey Moore, Chief Strategy Officer, Independent Sector

Amplifying our vision for change in partner spaces

Throughout the year, PEAK staff advocated for equity, transparency, and transformation through collaborations with the following organizations by speaking at conferences, participating in webinars and podcasts, giving presentations and workshops, serving as faculty, and contributing blog posts:

- Blackbaud Bowie State University Candid Catchafire GivingData Independent Sector National Center for Family Philanthropy
- National Human Services Assembly National Headstart Association Philanthropy Northwest Philanthropy Southwest Resilia Stanford Social Innovation Review

Fostering a critical partnership to build stronger talent pipelines

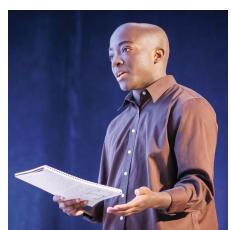
PEAK embarked on a partnership with **ABFE** and **Bowie State University**'s Philanthropy Fellows Program to help prepare graduate students of color for social sector leadership roles. The goal of this program is to lift up the voices and lived experiences of a new cadre of leaders and reimagine philanthropic and nonprofit policies and programs in ways that can affect positive change for our communities. To support this fellowship and other key initiatives, Satonya Fair served as a guest lecturer and advisory committee member, PEAK provided full scholarships for eight fellows to attend our GM101 program; and a Bowie State fellow joined PEAK's staff for a yearlong executive training experience.











Participating in critical conversations about equitable grantmaking technologies and practices

PEAK has strategically partnered with key stakeholders who are deploying data and technology in service of improving the experience of nonprofits throughout the grant lifecycle. We advocated for demographic data collection as a partner on the Demographics via **Candid** initiative. We also collaborated with **Tech Impact**, **TAG**, and **Grant Advisor** to prepare the rubric that will be used to inform the next edition of *Consumers Guide to Grants Management Systems* set to launch in mid-2024, and joined coalitions and advisory councils to ensure the PEAK remains at the ground floor of big technology-related shifts happening in our field.



INSIGHTS It's Time to Get Demographic Data Right by C. Davis Fischer

Our journey toward disability inclusion: learning, sharing, and evolving in action

After signing on to **Disability & Philanthropy** Forum's Disability Inclusion Pledge back in 2022, the PEAK team has made strides in learning from disability advocates, prioritizing implementation of an action plan to make substantial improvements in our accessibility practices, and advocating to our members and peers to join us in advancing disability inclusion and justice by sharing our story of learning and progress. We also launched a partnership with RespectAbility and welcomed a communications fellow to our team to support their career journey. As a result, we were able to go deeper into this facet of our equity journey by collaborating with and learning from a disabled person who generously shared insights from their lived experience.



"As an active ally and early adopter of the Disability Inclusion Pledge, PEAK understood that this was not just a checklist but an active learning journey. This work takes commitment, persistence and investment from all facets of the organization – all elements that PEAK has embedded into their disability inclusion work."

Sarah Napoli, Learning Services Director, Disability & Philanthropy Forum













Volunteers continue to be vital to our work.

In 2023, we were honored to have 386 individuals contribute their talent and time by serving in 456 volunteer roles—from leading our peer networks to sharing their knowledge, providing guidance, and contributing thought leadership. And in collecting their feedback, we learned that our volunteers not only valued the opportunity to give back to the field, but they also benefited from the experience by gaining new skills, raising their professional profile, and deepening their network. As documented in our annual volunteer survey, volunteers overwhelmingly expressed high levels of satisfaction with their experience and contributions, with 97 percent planning to volunteer again.



Our 2023 Volunteers

20 board members

141 chapter leaders

75 committee members

28 peer group leaders

22 advisory council members

46 Insights and *Journal* contributors and guest editors

98 annual convening speakers

20 service learning pilot members

6 Grants Management 101 cohort advisors



"Volunteering with the PEAK Northeast chapter has been transformative. Our events and chapter chats provide forums for exchanging knowledge and experiences, creating a dynamic learning environment. These experiences bolster my personal and professional growth and create opportunities for me to make a meaningful difference."

Audra Aucoin, Grants Manager/Analyst, Institute for New Economic Thinking







Expanding and deepening support for our volunteers

PEAK's Volunteer Leadership Summit, held each September, is our signature program that offers opportunities for our volunteers to enhance their leadership and professional skills, deepen connections, practice self-care, and network. The 2023 virtual convening was packed with compelling speakers who led exercises for aligning personal values with career goals, demonstrated skills mapping, and encouraged radical self-adoration.

"We've consistently volunteered with PEAK for more than two decades because of the opportunities to engage with this community, help our field evolve, and mentor the newer generations of employees in our sector."

Adin Miller, Chief Executive Officer, Los Altos **Mountain View Community Foundation**





PLANNIN'

PEAK Grantmaking 2023 Impact Report



ANNINGE RUDGETING FOR REVIE

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tes beyond the grant (i.e. dothyned courses

170 attended annual Volunteer Leadership Summit

44

attended first Chapter and Peer Group Leaders Retreat

10

participating in new Learning to LEAD cohort



In addition, PEAK chapter and peer group leaders met in person for the **Chapter and Peer Group Leaders Retreat** for the first time at PEAK2023. With a focus on networking, innovative ways to engage members, and expanding volunteer management skills, participants left feeling primed with innovative tactics to try in the new year.

PEAK also laid the groundwork for its **Learning to LEAD** pilot in 2024, which will bring together a small group of dedicated volunteer leaders who aim to reimagine what is possible for themselves and their careers. This cohort-based virtual program combines the benefits of one-on-one coaching, professional development workshops, and teambuilding experiences to support participants with the powerful pairing of transformative tools and frameworks with a nurturing community. "Volunteering with PEAK Midwest has allowed me to connect with an amazing community of warm, welcoming, and brave leaders who are committed to advancing equity in the field of philanthropy. They have infused my professional network with joy, and I look forward to building more new and meaningful relationships."

Jenna Beltrano, Program Officer, Evanston Community Foundation









Our 2023 board of directors prided itself on collaborative leadership, transparency, and passionate contributions to PEAK.

Our 17-member board was a culturally and demographically diverse group of smart, influential, and passionate individuals dedicated both to ensuring strong infrastructure for the organization and continuous learning and development. In 2023, board committees worked collaboratively to provide guidance to staff in developing our objectives and key results (OKR) framework. We also had a milestone year in making strides to implement governance best practices by defining board recruitment processes and policies, and by revamping board member onboarding and orientation process into a system that allows for continued strategic board growth. We support board members through a peer-mentoring program, a board assessment strategy and tool, and ongoing governance learning opportunities.

"Being a PEAK board member for the past six years has been one of the most fulfilling experiences of my career. I've learned so much and contributed as much as I could, and I'm deeply grateful for those who have stepped up to serve."

Tiauna George, Senior Director of Grants, Energy Foundation, *PEAK Grantmaking 2023 Board Member*

"Serving on the board with peers who share PEAK's vision for advancing the field of philanthropy is deeply rewarding. Beyond championing PEAK and its Principles, I gain valuable leadership experience that I am applying to my own work and engagement with Seybert's board."

Theresa Jackson, Foundation Manager, The Seybert Foundation, PEAK Grantmaking 2023 Board Member



For the PEAK team, 2023 was a year of growth, transformation, and connection that advanced our aspiration to be a next-level nonprofit.

> We codified our commitment to internal transformation by prioritizing strategies and practices essential to becoming a truly next-level organization—from building robust infrastructure and ensuring sustainability to nurturing a culture where our people thrive. In 2023, we launched an initiative to implement a new association management system, strengthened our team's productivity and communication tools, and introduced new internal operations to streamline processes and better support the team.

> Over the past year, not only did staff grow in numbers, strengths, and perspectives, we made strides in cultivating a people-centered work culture by prioritizing and supporting staff wellness, career growth, and a coleadership model where each member of the team is vested in advancing our vision and mission.













Milestones in putting people first

For the third year running, PEAK earned the Great Place To Work certification, which recognizes organizations that create an outstanding employee experience, with a score of 95, our highest to date.

We welcomed six new staff members and two fellows. The expansion of our team has enabled us to deepen member support and advance our mission. Fellows joining us via Bowie State University and RespectAbility enabled us to support early-career professionals pursuing social sector careers while we benefited from their perspectives and experience.

We advanced our collective and individual equity learning journeys by delving into deep learning and reflection on intersectional equity. CommunityBuild Ventures and Disability & Philanthropy Forum guided us in ongoing group learning and provided support that helped us progress PEAK's accessibility practices.

We launched a sabbatical policy, offering employees with four years of tenure 20 paid days for rest and rejuvenation. Four members of the team participated in 2023 and reported that it was a transformative experience.

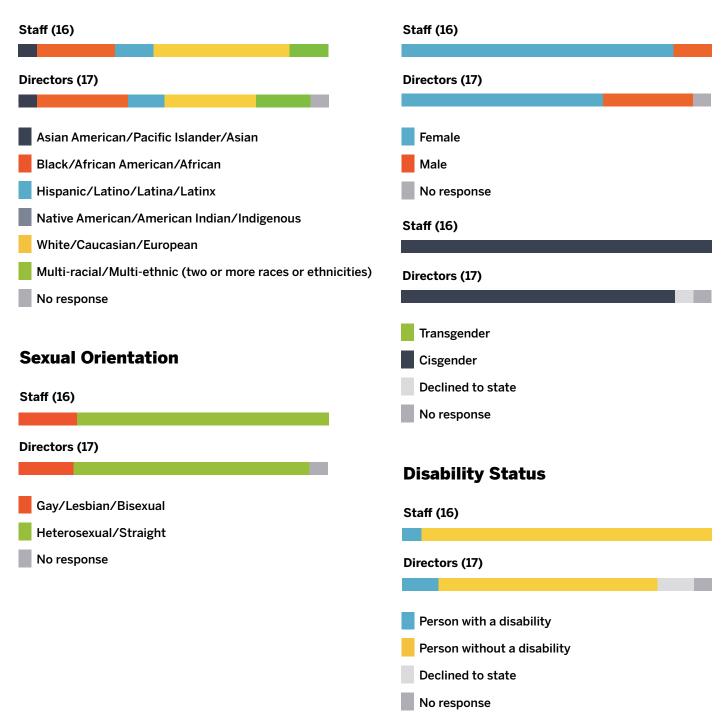
We provided career coaching and wellness resources. Staff members spent 84 hours with coaches, and 16 employees downloaded the Headspace app and used a range of self-care resources.

We encouraged volunteerism by providing paid time for staff members to support nonprofit and community service projects, with 70 hours logged in 2023.

STAFF AND BOARD OF DIRECTORS DEMOGRAPHICS

Gender Identity

Race and Ethnicity



Note: Board of directors data was collected in November 2023; staff data was collected in November 2022.

2023 ACKNOWLEDGEMENTS

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

Members

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