

# **PEAK Grantmaking Peer Network Volunteer Leader Playbook**

# PEAK Grantmaking Peer Network Volunteer Leader Playbook

Dear volunteer,

Thank you for joining our community of dedicated members—the individuals who lead our chapters, affinity groups, and caucuses, ensuring they are places of belonging, learning, innovation, and support. PEAK Grantmaking thrives because of your active volunteerism and leadership.

Each year, over 150 individuals contribute their talent, time, enthusiasm, knowledge, and dedication to leading and supporting our peer networks.

Our volunteers act as champions for equitable, effective grantmaking practice change as well as advocates for their peers to become change agents with them. We always welcome new and returning volunteers to lead and support our efforts!

PEAK aims to demonstrate our appreciation for our volunteers by providing ample benefits to aid in professional development, skill building, and professional network growth.

In this playbook, you'll find clearly defined expectations for staff and volunteer leaders, resources to support you in your role, and policies and procedures to ensure consistency in the ways that PEAK supports your efforts.

We hope you find this to be a useful resource, and we welcome your feedback regarding what's working, what could use improvement, and what's missing. We greatly appreciate the dedication and passion you bring to building community at PEAK. Thank you!

With gratitude,

*PEAK's Community Engagement Team*

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# Types of Peer Networks

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PEAK Grantmaking is made up of over 8,000 members, based in the United States as well as several other countries. PEAK has a variety of peer networks that members can explore to help them make connections, broaden their professional networks, and learn with peers on a deeper level in ways that matter to them.

## **Affinity Groups**

PEAK affinity groups provide space for members to connect, network, build skill sets, and share effective, equitable grantmaking practices with those who share similar roles and work in similar funding institutions. Membership eligibility may vary by group.

## **Caucuses**

Based around personal identity, PEAK caucuses provide a safe space where members can connect, speak freely, and be supported by one another. Each caucus is open to all members of the PEAK community who personally identify with the caucus' identity.

## **Chapters**

There are 14 chapters, each representing a geographic region, where PEAK members gather to share knowledge, strengthen practice, develop skills to meet career goals, and advance the profession, all while enjoying each other's company. All members are welcome to attend any chapter event.

# Volunteer Roles

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Peer networks are led by volunteers from each community with support from the PEAK team.

## Chapter Steering Committees

PEAK chapter volunteers work collaboratively as a leadership team to support the engagement of chapter members by planning and hosting between two and four events per year, serving as the chapter's liaisons to PEAK Grantmaking staff, and building local partnerships that support the chapter's work.

- **Volunteer opportunities:** More than 70 across all 14 chapters
- **Positions and scope:** Specific roles and current openings vary by chapter, but these are the general position descriptions for chapter leadership committees:
  - Chair/Cochair
  - Vice Chair/Cochair
  - Communications Chair/Cochair
  - Programs Chair/Cochair
  - Membership Chair/Cochair
  - Committee Member
- **Term:** January 1–December 31; officers serve two-year terms, committee members serve one-year terms
- **Eligibility:** Current PEAK members who work or live in the chapter region for which they serve

## Caucus Steering Committees

PEAK caucus volunteers work collaboratively as a leadership team to build community amongst those who identify with the personal identity around which the caucus is organized, helping them to connect, network, and support one another as well as leading the planning and implementation of between two and four caucus meetings per year.

- **Volunteer opportunities:** More than 10
- **Positions and scope:** Specific roles and current openings vary by caucus, but this is the general position description for caucus steering committees:
  - Cochair
  - Committee Member
- **Term:** January 1–December 31; cochairs serve two-year terms, committee members serve one-year terms
- **Eligibility:** Current PEAK members who meet the criteria for caucus eligibility

## Affinity Group Steering Committees

PEAK affinity group volunteers work collaboratively as a leadership team to build community amongst those who identify with the professional identity around which the group is organized, helping them to connect, network, and support one another as well as leading the planning and implementation of between two and four affinity group meetings per year.

- **Volunteer opportunities:** More than 10
- **Positions and scope:** Specific roles and current openings vary by affinity group, but this is the general position description for affinity group steering committees:
  - Cochair
  - Committee Member
- **Term:** January 1–December 31; officers serve two-year terms, committee members serve one-year terms
- **Eligibility:** Current PEAK members who meet the criteria for the affinity group's eligibility

# Responsibilities of Peer Network Volunteer Leaders: What we can expect from you

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The PEAK team aims to support you as you lead your peer network! Here are the expectations for volunteers, which we've set in order to best support you:

- Communicate updates in peer network leadership (i.e., new volunteers beginning and volunteers resigning) to PEAK's peer group specialist or chapter specialist. This will ensure that the PEAK team is able to recognize and communicate with volunteers.
- Meet baseline goals/activities. (See page 8)
- Share concerns with the PEAK staff team in a timely manner.
- Follow communications and **brand guidelines**.
- Utilize the **Peer Network Event Details Form** to share event details with the PEAK team.
- Plan events with six-to-eight weeks advance notice in order to collaborate with the PEAK team and promote the event to members.

# Volunteer Support from PEAK Staff: What you can expect from us

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PEAK staff collaborate with volunteers in a myriad of ways. We deeply admire our volunteers' dedication to serving as changemakers and appreciate you sharing your time and talent with the PEAK community. No matter the volunteer role, the PEAK staff is here to support you along the way.

PEAK staff support peer networks in the following ways:

- Managing most administrative and operational functions by
  - maintaining current membership and leadership rosters;
  - providing role expectations, support, and guidance for volunteer leaders as needed; and
  - sharing current information on the PEAK website detailing how PEAK members can join and participate in chapter and peer group activities.
- Assisting with network events by
  - partnering with you to brainstorm programming ideas, in part through several exclusive workshops offered throughout the year;
  - promoting your events and tracking registration;
  - coordinating speaker and venue agreements;
  - attending your meetings, on request, to
    - provide updates and share resources;
    - present deep dives into our resources and Principles;
    - foster and facilitate conversation; and
    - provide technical support as needed.
- Assisting in volunteer recruitment, including
  - hosting periodic volunteer fairs; and
  - posting your open volunteer positions on our volunteer board website page.

# Planning Resources

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## Annual Peer Network Checklist

Below, find the annual baseline expectations for each peer network, along with recommended activities for successfully building your community.

### Baseline Goals:

- Develop an Annual Plan and submit it to PEAK Grantmaking by the last day of February.
- Host a minimum of two meetings per year, with the goal of providing informal networking, knowledge-sharing, and educational programming.
- Participate in at least five peer network volunteer leader meetings hosted by PEAK Grantmaking. Here are a few opportunities:
  - Annual welcome orientation.
  - Quarterly virtual check-in meetings.
  - Chapter and peer group retreat meetings at PEAK's annual convening.
  - Volunteer Leadership Summit.
- Engage at least four new additional members as volunteers. This could include additional steering committee members; members of your programs, membership, communications communities; and meeting hosts.

Hosting additional educational and/or networking events throughout the year is encouraged if the time and capacity of your volunteer team allows. For instance, peer networks may choose to host informal networking sessions monthly or bimonthly. However, peer networks should not plan to host more than three formal educational sessions in a year, and must ensure that PEAK is able to support meetings.

### Meeting Planning Activities:

- Host a meeting at the annual convening. (PEAK2024 takes place March 18–20, 2024)
- Host at least one educational meeting per year.
- Coordinate with PEAK Grantmaking staff to ensure a presence (board or staff) at meetings when appropriate.

- Share information about the peer network and available PEAK Grantmaking resources, programs, and services at each meeting. (PEAK Grantmaking staff can help!)
- Track attendance at each meeting. (PEAK staff will provide registration lists)
- Share feedback with PEAK staff after each meeting.

If a peer network has trouble reaching the meetings baseline, PEAK Grantmaking staff can offer additional support. This support may include, but is not limited to, monthly coaching calls with volunteers, hosting events on behalf of the peer network, direct outreach to members, helping volunteer leaders recruit additional event volunteers, and/or hosting meetings independently.

### Communications Activities:

- Follow PEAK Grantmaking **brand guidelines** in all communications.
- Download and use PEAK Grantmaking branded materials at every meeting for **presentations**, signage, name badges, agenda, sign-in sheets, etc. PEAK chapter logos can be downloaded from this **folder**.
- Work with PEAK Grantmaking staff to track registration for all events through PEAK Grantmaking website event posts.
- Promote meetings to members at least six-to-eight weeks before each meeting.
- Follow up with meeting attendees after each event to provide a thank-you, resources from the event, and an event evaluation survey.
- Post updates and discussions on the peer network's **CONNECT** online community.
- Create and send a quarterly newsletter to network membership with member news, meeting recaps, updates from PEAK Grantmaking, and upcoming events. **This activity is optional.**

# Planning Resources

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## **Volunteer Recruitment and Development Activities:**

- Attend the PEAK Grantmaking orientation for your position in February 2024.
- Hold monthly or bi-monthly planning meetings (virtual meetings or conference calls) with your volunteer steering committee.
- Recognize and thank volunteers for their contributions during the year.
- Nominate at least one member from the peer network to the PEAK Grantmaking Board of Directors.

## **Membership Growth and Engagement Activities:**

- Solicit member input on meeting topics, networking events, and volunteering through an annual membership survey.
  - PEAK will operate the survey for you on our SurveyMonkey account to ensure branding guidelines are followed and that results are accessible to peer network volunteer leaders and PEAK team members.
- Consistently showcase the benefits of membership in PEAK Grantmaking to encourage individuals and organizations to join.
  - Send welcome emails to new PEAK members in your peer network each month. (Consider inviting new members to meet up virtually for coffee or call them personally!
  - PEAK staff will provide monthly rosters with your membership information. You will also receive registration lists for your events. Those lists will note which members are new that month, the type of membership for each person, and which event registrants are nonmembers.

The following activities are required for chapters and recommended for caucuses and affinity groups:

- Host periodic welcome events for new PEAK Grantmaking members.
- Recruit volunteer greeters to welcome event attendees.
- Host periodic virtual or in-person networking coffee hours (or happy hours) to help members connect.
- Invite nonmember grantmakers in your region to attend chapter meetings and join PEAK Grantmaking.

## **Partnership Activities:**

- Actively engage with other PEAK Grantmaking peer network leaders to share information, advice, and support. Here are a few ideas:
  - Share an idea at a check-in meeting with volunteer peers.
  - Reach out to peer volunteers to share tips and success stories.
  - Use CONNECT to answer peer network leaders' questions and share resources and good practices.
  - Attend other chapter or peer networks' meetings when appropriate.
- Share your calendar of events with local partners (such as EPIP, regional associations, affinity groups from other PSOs, etc.) and ask them to promote your events.
- Promote events hosted by local partners to your membership.
- Cohost an event with a local partner.

# Planning Resources

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## **Scheduling in Coordination with the PEAK Calendar**

The PEAK staff wants our efforts and programming to compliment that of our peer networks, and to ensure that staff are available to support your meetings. We also want to make sure that we aren't over-programming for our staff, volunteers, or members.

Because of this, we ask peer network leaders not to schedule events at key times throughout the year, including:

- PEAK's wellness week during the week of Memorial Day, May 27–31, 2024
- PEAK's wellness week during the week of Labor Day, September 2–6, 2024
- During the Volunteer Leadership Summit, September 17–18, 2024
- PEAK community-wide programming, such as our summer learning series

Consult the **2024 Calendar of Peer Network Leader Meetings and Important Dates** for a full list of dates to avoid when planning your events.

## **Annual Self-Assessment Survey**

Each November, peer network volunteer leaders receive a self-assessment survey to help you reflect on the past year and to help PEAK Grantmaking understand the trends around peer networks and find ways to offer better support. The survey should be submitted electronically by one cochair from each peer network no later than January 15 of the following year (e.g., the November 2023 self-assessment survey is due by January 15, 2024).

# Peer Network Policies

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## Speaker Expenses Policy

PEAK Grantmaking has a limited, shared budget to cover speaker fees and expenses for peer network meetings. Pre-approval by PEAK Grantmaking is required for all paid speakers. Paid speakers should be trusted experts who have proven public speaking experience on the topic of interest. (Paid speakers may also opt to donate their honorarium to a nonprofit of their choice in lieu of accepting an honorarium directly.) We recognize that PEAK members in our community have valuable knowledge to share with their peers. If possible, we ask members to volunteer as speakers, especially when the speaker works for a PEAK Organization Member which supports involvement in PEAK for professional development purposes.

To submit a pre-approval request for speaker fees and/or travel expense reimbursement, document the following information in the **event details form** and send it to the chapter or peer group specialist as early as possible:

- Speaker's name and organization
- Explanation for selecting this speaker, including previous experience with the speaker
- Estimated budget for expenses requested by the speaker
- Session description, including learning objectives and draft agenda
  - Consider more than one session, repeat sessions, or collaborating with another peer network to maximize cost-benefit
- Estimated meeting attendance

Please allow four business days for response by the chapter or peer group specialist.

To offer consistency and clarity to those peer network volunteers seeking to engage outside speakers, we are sharing suggested honorarium rates. Please know that the PEAK team is willing to negotiate directly with speakers as needed.

Suggested honorarium rates for speakers participating in virtual events:

- One-hour panel: \$150 per panelist for up to four panelists
- One-hour presentation: \$500
- Ninety-minute presentation: \$750
- Two-hour presentation: \$1,000

Suggested honorarium rates for speakers participating in in-person events:

- One-hour panel: \$250 per panelist for up to four panelists
- One-hour presentation: \$1,000
- Ninety-minute presentation: Up to \$1,500
- Two-hour presentation: Up to \$2,000

Once the speaker fees/travel reimbursement has been approved:

- All contracts and/or speaker agreements must be signed by PEAK Grantmaking staff. Peer network volunteer leaders are not authorized to sign contracts or speaker agreements.
- An invoice should be submitted to the chapter or peer group specialist within 30 days of the meeting.
- Reimbursement/payment will be processed within 14 business days and only after confirmation from the peer network volunteer leader that the speaker conducted the session in the desired format and quality, as outlined in the proposal.

**Please note:** PEAK Grantmaking will not pay speaker fees, expenses or travel costs for PEAK Grantmaking members, vendors, and some consultants.

For questions or concerns, please contact the chapter or peer group specialist.

# Peer Network Policies

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## Catering Policy

This is the policy for catering at PEAK Grantmaking's affinity group, caucus, and chapter events and meetings. If you have any questions or need assistance, please contact the PEAK chapter specialist or peer group specialist.

Peer network leaders are encouraged to provide food and non-alcoholic beverages at in-person meetings and events to promote registration and participation as well as to help guests feel welcomed and ready to learn and connect.

Peer network leaders should attempt to solicit in-kind donations from member organizations to cover catering for events. Starting in 2024, PEAK will have a process in place to recognize in-kind donations. If in-kind donations are not available, funds from PEAK are available to cover these costs on an as-needed basis.

**Pre-approval is required for PEAK to cover catering expenses, based on the estimated number of attendees.** To ensure pre-approval and payment of catering costs, peer network volunteers should complete the following steps:

1. Notify the chapter specialist or peer group specialist via email as early as possible in the process that you are seeking catering support. Ideally, this would happen when first notifying the chapter specialist or peer group specialist about the event. PEAK Grantmaking will include a question about dietary restrictions on the registration page to help ensure an inclusive event for all participants.
2. Determine an estimated final headcount two weeks before the event.

3. Request a cost estimate from caterer. (Breakfast and lunch should be about \$15–\$18 or \$20–\$25 per person, respectively. A gratuity of up to 20 percent of the meal cost may be added to the final receipt)
4. Submit the cost estimate to the chapter specialist or peer group specialist for approval, including how and when payment is expected by the caterer. Please allow up to five business days for review and approval. PEAK will pay upfront for expenses using a credit card, if possible. If an invoice needs to be paid in advance, a payment request should be processed at least 14 business days before the event. If needed, a peer network leader may pay for pre-approved expenses and receive reimbursement from PEAK. Only pre-approved expenses will be reimbursed or paid.
5. Submit the receipt or invoice to the chapter specialist or peer group specialist within 30 days of the event for payment. Payment will be processed within 7–10 business days and forwarded to the payee.

Alcohol is permitted at peer network activities. However, PEAK has an obligation to manage its funds in a manner consistent with its status as a public charity. Therefore, PEAK does *not* provide funds to cover the costs of alcohol at peer network events.

*PEAK understands that offering flexibility is important to helping all chapters succeed. Please contact the chapter specialist or peer group specialist to discuss any catering needs or questions.*

# Peer Network Policies

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## Event Registration Policy

All peer network events (including free, social events) must be posted on the PEAK website for promotion as well as for registration of attendees, tracking participation, and follow-up with attendees. Once the PEAK team has received your Event Details Form and has confirmed the event may be hosted, the PEAK team will open registration in our online member portal and post the event details on the PEAK website at [www.peakgrantmaking.org/events](http://www.peakgrantmaking.org/events).

Online pre-registration through the PEAK Grantmaking portal is required for all peer network events. Registration for virtual events will be open through the day of the event. Registration for in-person and hybrid meetings will close approximately one week before the day of the event.

### Registration Fees for Peer Network Events

Registration fees for most events:

- Organization Members: Free
- Individual Members: Free
- Nonmembers: Free

Registration fees may be required in the case of some educational events for which PEAK is incurring speaker costs, as follows:

- Organization Members: Free
- Individual Members: \$25
- Nonmembers: \$55

Volunteers who are Individual Members seeking special dispensation to attend at no cost may email the chapter specialist or peer group specialist to receive a complimentary registration.

## Registration Lists

The chapter specialist or peer group specialist will pull and share registration lists with peer network volunteer leaders regularly; specifically, lists will be shared weekly in the last month leading up to the registration close date, and daily during the last week leading up to the registration close date. Peer network leaders may also request registration lists via email whenever desired.

## Onsite Registration

We recommend that all participants register online before the event and that a volunteer leader is designated to check in attendees using the registration list. If an individual shows up to the event without pre-registering, please take down their name, organization, and email address, and share with the peer group specialist or chapter specialist after the event for follow-up and post-registration, as needed.

## Nonmembers at Peer Network Events Policy

PEAK chapter meetings are open to PEAK members and to those who are eligible for Individual Membership. Other guests (such as vendors, students, and those not in the grantmaking profession) may participate on an event-by-event basis, as determined by chapter leadership and with an understanding that no sales pitches are permitted.

Caucus and affinity group meetings are only open to current PEAK Grantmaking members.

# Peer Network Policies

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## Starting a New Peer Network Policy

PEAK's peer groups offer philanthropy professionals within the PEAK community the opportunity to intentionally, meaningfully, and consistently connect with others who have shared identities and goals. Peer groups offer members curated events that support PEAK's mission to empower grants management professionals and drive positive change in philanthropy.

As the needs of our community and the philanthropic sector change and evolve, PEAK continues to change and evolve as well, supporting new spaces for professional development and networking to thrive in service of our mission.

PEAK draws its strength from its members, many of whom volunteer to lead peer group spaces. If members express interest in being part of a peer group space within the PEAK community that is presently lacking, and is of interest to grantmaking/philanthropic professionals, PEAK will consider creating a new group utilizing the process below.

### Group Type Definitions

PEAK offers several types of peer spaces, which meet a minimum of twice a year virtually or in person for professional development and networking purposes:

- *Affinity Groups*, led by two-to-four cochairs, are focused on networking and peer learning based on professional identity, and are open to all members of the PEAK community.
- *Caucuses*, led by two-to-four cochairs, are a safe space where members can connect, speak freely, and be supported by one another. Caucuses are open to all members of the PEAK community who personally identify with the caucus's identity.

## Overview of the New Peer Network Creation Process

1. Members(s) submit a peer group request idea.
2. The PEAK staff reviews the idea for approval.
3. Group is piloted with the community.
4. Pilot group is assessed for continuation after one year.
5. Official launch of the new peer group.

### New Peer Network Creation Process, in Detail:

#### 1. Member (or members) submit a peer group idea.

There are two ways to submit an idea.

- Closed process: Requests should be shared by email with the PEAK peer group specialist, and provide the following information:
  - a. Primary focus and target audience
  - b. How this offering aligns with PEAK's mission, **core values**, and **principles**
  - c. Demonstrated need or interest for peer group, including why it is not a duplication of existing PEAK spaces or resources or a duplication of spaces and resources readily available through PSO partners
- Open process: Peer group ideas may also be submitted along with other feedback in a PEAK member survey provided every 18 months.

# Peer Network Policies

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## 2. The PEAK team reviews the idea for approval.

PEAK staff will ensure that the group being considered is mission-aligned, aligned with strategic priorities, and that sufficient capacity is available to support it alongside current groups. The following criteria must be met before a pilot group is approved.

- The potential group focus aligns with PEAK's mission, strategic priorities, and core principles, and:
  - Has a clearly defined primary objective and target audience.
  - Provide a demonstrated need and/or a topic of interest for members that does not duplicate the efforts of an existing PEAK group/initiative or a readily available PSO partner group.
    - If duplicative, consider a short-term working group, a subproject of an existing group, or lifting up another PSO's work.
  - Cost and staff time required are pre-determined and reasonably accommodated within current capacity.
- A review by the PEAK Membership and Community Engagement (MCE) team to create a recommendation, which may include designating the potential peer group as a *caucus*, *affinity group*, *community of practice*, or *working group*.
- A review of the MCE recommendation by the Knowledge and Learning Team, which then offers input. MCE and Knowledge Teams finalize recommendations, including:
  - Identifying PEAK staff content advisors, as needed. All groups will be supported by the peer group specialist. Caucuses and affinity groups receive general content advisement, as needed on a case-by-case basis, by the Knowledge and Learning Team. Communities of Practice require a dedicated content advisor from the Knowledge and Learning Team.
  - Discussion and final approval by PEAK's senior leadership based on finalized recommendations.

- Approval or denial for a pilot is then shared with the requester(s) by the peer group specialist. As part of this step:
  - A rationale will be given to the requester(s) regardless of approval or denial.
  - Approved pilots will be announced in PEAK Monthly.
  - Requesters may begin conducting direct outreach in conjunction with cochairs, if applicable.

## 3. Group is piloted with the community and assessed for continuation.

A communications plan is activated for approved pilot peer groups, including:

- Confirming with requester(s).
- Informing senior leadership team.
- Informing all staff.
- Updating website to include pilot group.
- Updating sign-up webform to include pilot group.
- Updating member database and CONNECT to include pilot group.

In partnership with member volunteers, requester(s) will:

- Define pilot group objectives, goals, and community agreements, including
  - Who can join (target audience?).
  - Group's purpose and primary objective.
  - Meeting protocol, such as how often groups will meet. (Two meetings minimum is required annually.)
  - How members participate, covering the preferred meeting format. (Some examples include networking, professional development, information exchange, self-care, etc.)
  - Rules for member participation, e.g., confidentiality terms ("Vegas Rules"), new member sign-up, community commitments, etc.

# Peer Network Policies

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- Identify/confirm at least two volunteer cochairs, who must commit to a two-year term to lead the group.
- Recruit members.
- Explore member interest by hosting two exploratory gatherings within the PEAK community during the approximately yearlong pilot. Successful group engagement would mean that at least 15 members RSVP/attend each exploratory session and provide positive feedback.

PEAK will offer volunteer leadership training and technical assistance throughout the pilot and conduct biannual check-ins or more as needed.

## 4. Pilot group is assessed for continuation after one year.

Following first-year exploratory gatherings, PEAK will decide if the group should continue and be made official.

Considerations for peer group approval include sustained member interest, two cochairs committed to a two-year term, at least 25 confirmed group members, continued mission alignment, and identified opportunities to share learnings with the broader PEAK community and/or sector.

If the pilot group does not move forward, other options may be available, such as continuing “unofficially” as an annual event at the PEAK convening or hosting PEAK-led biannual town hall meetings.

## 5. Official launch of the new peer group.

## Peer Network Name Change Policy

*Last updated 12/6/2023*

Our chapters, caucuses, and affinity groups are special communities, designed for members to build a sense of belonging with their peers. We recognize the importance of ensuring that names for these networks are inclusive, representative, and resonant for our members—and that sometimes names must change to

continue to serve these functions. We also know that it is important to uphold the PEAK Grantmaking brand and reputation in our own community.

To balance these needs, we have outlined an updated process for changing the name of a chapter, caucus, or affinity group. This updated process ensures that peer network leadership and PEAK staff are working collaboratively, that PEAK leadership is informed and consulted throughout the process, and that members continue to have opportunities to voice their opinions and be heard.

### Process to explore a name change:

- Peer network leadership notifies the chapter specialist or peer group specialist about their desire to change the name.
- Specialist loops in Membership and Community Engagement (MCE) team leadership for initial review and discussion.
- MCE team leadership notifies executive leadership and asks about any initial concerns, questions, etc. for the peer network.
  - Include number of peer network members, context for why the change is being discussed.
- MCE team notifies board members in the peer network about the peer network request and asks about any initial concerns, questions, etc. for the network.
- Chapter specialist or peer group specialist brings back any initial questions and concerns to peer network leadership along with approval to move to the next step.

### Process to select a new name:

- Peer network leadership discusses potential new names with members.
- Once a few names have been identified, use a survey or poll during a meeting to gather name ideas from membership.
- Peer network leadership shares potential names with the chapter specialist or peer group specialist.

# Peer Network Policies

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- Specialist ensures that MCE and executive leadership approve of potential names before creating a survey for network membership.
- Specialist designs the survey. Peer networks should use ranked choice voting for top choices.
- Peer network leadership works with the specialist to share the survey with their membership.
- Specialist sends results to peer network leadership and reviews the results of the survey with them.
- Peer network leadership shares recommended determination with the specialist.

## Process to approve a new name:

- The potential new name must first be approved by MCE and executive leadership.
- Once approved by leadership,
  - All staff and board are notified of the potential change in name.
  - The final recommendation is brought forward to the peer network membership to vote on and approve. This can be done at a meeting where at least 10 percent of members are present or via a survey completed by at least 10 percent of network membership. If a survey will be used, this will be designed by the chapter specialist or peer group specialist on a PEAK account.

## Process to notify community once a name change is approved:

- If voted on at a meeting, peer network leadership notifies the chapter specialist or peer group specialist of the vote. If determined by survey, the specialist notifies peer group leadership of the results.
- PEAK staff determines an effective date for the name change.
- Once final approval is secured,
  - All staff and board are notified.
  - All peer network members are notified.
  - All peer network leaders are notified.

- The full membership is then notified via email announcement in a PEAK newsletter.
- The new peer network name is updated on the PEAK website, in Nimble, in CONNECT, etc. on the effective date.

## Chapter Geography Change Policy

*Last updated 12/13/2023*

Our chapters are special communities, designed for members to build a sense of belonging with their peers within certain geographic borders. Over the past few years, chapter leaders have learned to work differently when they pivoted to create communities online, and have become adept at using technology creatively to connect chapter members. In many instances, chapter meetings are open to everyone within the PEAK community—not just those within that chapter’s borders. We have also heard feedback from volunteers about the power of numbers and the benefits of working with volunteer leaders across chapters more intentionally. We also know that it is important to uphold the PEAK Grantmaking brand and reputation in our own community and in the sector.

To balance these needs, we have outlined an updated process for changing the geographic boundaries of chapters. This could include merging two neighboring chapters, bringing over a portion of one chapter to another, or sunseting a chapter to be absorbed by another neighboring chapter.

This updated process ensures that chapter leadership and PEAK staff are working collaboratively, that PEAK leadership is informed and consulted throughout the process, and that members continue to have opportunities to voice their opinions and be heard.

# Peer Network Policies

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## Initial approval to proceed by staff and leadership:

- Chapter leadership notifies chapter specialist about desire to change name.
- Chapter specialist loops in Membership and Community Engagement (MCE) team leadership for initial review and discussion.
- MCE team leadership notifies executive leadership and asks about any initial concerns, questions, etc. for the chapter(s).
  - Include number of chapter members, context for why the change is being discussed.
- MCE team notifies board members in the chapter about the chapter geography change request and asks about any initial concerns, questions, etc. for the chapter.
- Chapter specialist brings back any initial questions and concerns to chapter leadership along with approval to move to next step.

## Exploration of a chapter boundary change by chapter membership:

- With initial approval to explore a chapter boundary change granted, the chapter leadership can work with the chapter specialist to communicate potential changes to the membership and get feedback. This should include:
  - A discussion about the change, including the reasons why it's being considered, the potential impact of the change to programming and engagement, and a call for questions and concerns from members.
  - Survey to determine interest by the membership in making this change.
- Review of survey and discussions by PEAK Grantmaking staff and chapter volunteer leadership to determine if moving forward with the change is worthwhile.

## Approval of chapter boundary change:

- Once member support is confirmed, PEAK leadership determines, in consultation with the board, if the boundary change will move forward.
- The final recommendation is then brought forward to the impacted chapter membership to vote and approve the name change. This can be done at a meeting where at least 10 percent of members are present or via a survey completed by at least 10 percent of the chapter membership. If a survey will be used, this will be designed by the chapter specialist on a PEAK account.
- If voted on at a meeting, chapter leadership notifies chapter specialist of the vote. If determined by a survey, the chapter specialist notifies chapter leadership of the results.
- Once quorum has been met, the PEAK Board of Directors must vote to approve the geographic change.

## Process to notify community once a name change is approved:

- Once final approval is secured, the following groups are notified:
  - All staff and board
  - All impacted chapter leaders
  - All chapter leaders
  - All impacted chapter members
- The full membership is then notified via email announcement in a PEAK newsletter.
- The new chapter name is updated on the PEAK website, in Nimble, in CONNECT, etc. on effective date.

## PEAK Community Agreements

We have adopted meeting norms designed to promote and foster an inclusive and safe space for the entire PEAK community. We ask that all meeting participants adhere to the **following agreements**.

# Meeting Resources

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## Step-by-Step Meeting Planning Guide

### 1. Create a great meeting agenda

PEAK Grantmaking members attend peer network meetings to connect with peers, for professional development opportunities, and for opportunities to network with grantmaking colleagues from across the PEAK's membership. Great meetings include an opportunity to learn and to connect.

Need help coming up with a topic and speaker for a meeting? Here are a few ideas and resources to get you started.

- Ask your members! Solicit topic suggestions from members by sending a SurveyMonkey survey. This will ensure that you choose a topic of interest to your members. Here are tips for the survey:
  - Include a cut-off date for feedback. Don't give too much time. One week should be sufficient.
  - Keep the survey short (two-to-five questions) and promote the fact that it is short.
  - Send the survey at the right time; e.g., avoid holidays and don't send your survey on a Friday.
- Consider hot topics being discussed in the online PEAK Grantmaking CONNECT communities.
- Check out the topics and speakers at other upcoming peer networking events, listed at [www.peakgrantmaking.org/events](http://www.peakgrantmaking.org/events).
- Brainstorm with your leadership team (i.e., your steering committee). What are you talking about in your own grantmaking organizations? What meetings would you like to attend?
- Read PEAK Grantmaking's [Insights posts](#) for inspiration.
- Replicate one of PEAK's Annual Convening sessions. Members unable to attend the convening may benefit from a repeat session.

You can also ask PEAK staff to put on a workshop for you, or help facilitate a meeting!

### 2. Select speakers

Speakers for peer network events can—and should—come from within the community and the sector. Members appreciate learning from their peers regarding topics they care about, and also having time and space with peers to ideate, share, and commiserate. Presenters at your peer network events should strive to:

- Be engaging and have an interactive presentation—everyone has expertise and experiences to share.
- Present on a topic of interest to your members.
- Discuss concrete skills and lessons for grantmakers to bring back to their organizations.
- Activate and inspire participants as change agents.
- Connect their sessions to (at least one of) the [Principles for Peak Grantmaking](#).
- Ensure there is time for questions and open discussion.

Consider hosting a moderated panel discussion among members to offer different insights and perspectives on a single topic, or asking members to share how they approach a certain practice (such as board books, applications, or reports).

While members can be great speakers, speakers do not need to be PEAK members. You can feel free to engage folks from across the sector and beyond, such as attorneys, professors, activists, career coaches, communication experts, certified public accountants, foundation executives, and more.

For information about booking a speaker who charges a fee to speak and/or requires travel expenses to be covered, please review the Speaker Expenses Policy, on page 11.

# Meeting Resources

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## 3. Select a location

Choosing a venue is dependent on the geographic size of the region, the number of attendees, the technical requirements of a meeting or speaker, and the availability of in-kind space donations. Here are ideas for selecting meeting locations:

- Hold meetings in larger cities within a one-to-three hour drive for most members (if possible).
- Rotate meetings between regional cities with large concentrations of members.
- Host a virtual meeting and encourage members to host “watch parties” in locations that are convenient/local which still allow and promote face-to-face discussions and networking.
- In cities with large member concentrations, consider planning simultaneous in-person meetings.
  - To better facilitate networking, provide discussion topics for after the session. Individual meeting sites can report back to the peer network as a whole with a summary of their discussions.
- If you are planning to host a meeting with a webinar or conference call component, ask questions about the room setup and technology tools available to ensure the meeting space can meet your technical needs.

Providing meeting space is a great way to support PEAK and the grantmaking profession! Once the city has been selected, ask members of your steering committee if one of their organizations has available meeting space. If not, brainstorm specific foundations you could approach directly or email all members with a call for meeting space.

## 4. Select a date

Here are tips for selecting meeting dates:

- Avoid holidays, including religious holidays. You may reference an interfaith calendar such as [this one](#) to aid in your planning.

- Discuss what day of the week works best for your members with your leadership team (i.e., steering committee) and/or survey your membership. Many people, but not all, prefer to avoid Fridays and weekends.
- Many peer networks have found success in hosting a Spring meeting (in April or May) and a Fall meeting (in September or October) each year.

## 5. Critical step: Confirm your event with PEAK team

PEAK asks that peer network volunteers confirm every event with the PEAK team at least six-to-eight weeks, and preferably three months, before the event date.

**To host an event, you must first complete the PEAK Peer Network Event Details Form.** This critical form ensures the necessary information is provided to PEAK for the team to support coordinating logistics, opening registration, and promoting your event on the PEAK website. This form should be submitted to the chapter or peer group specialist at least six-to-eight weeks in advance of your meeting.

## 6. Promote the event

Once the PEAK team has confirmed your event, you will be provided with a direct link to the online registration page on the PEAK Grantmaking website. Once you receive this link, you should take these actions:

- Email your membership utilizing CONNECT direct messaging with an invitation to register.
- Encourage members to register by a certain date (at least one week before the event) to help gauge attendance for catering and logistical needs.
- Email your membership with reminders to register at specific times leading up to the event, such as two months out, one month out, two weeks out, and a final reminder one week out.
- Encourage prospective members to attend your event by sharing the registration link with your networks on LinkedIn or via your work/personal email.

# Meeting Resources

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- Encourage participation and promotion by partner organizations and their memberships, especially any corresponding regional association of grantmakers and/or affinity groups.
- Identify potential members who may be interested in attending and assign volunteers to issue personal email or phone invitations to them.

## 7. Plan logistics for the event

Set up a meeting with the venue at least two weeks prior to the event to understand logistics and determine needs. Also, be sure to take the following actions:

- Thank the organization for hosting the event and offer a place in the agenda for the host organization to say a few words of welcome and why PEAK and the peer network is important to them.
- Determine in advance what supplies the host site is providing and what you will need to bring.
- Review the tech and A/V capabilities. Ask if support will be provided onsite to help with working A/V, especially for hybrid meetings.
- Ask if the host needs a list of participants in advance and by when they need it.
- Determine if there are any special instructions for guests to follow (such as having an ID ready).
- Ask about signage to help folks get to the meeting.

In addition, recruit volunteers to welcome attendees, check them against the registration list, and collect contact information from on-site registrants.

## 8. Communicate with participants

Clearly communicate to meeting participants before the event:

- Provide clear logistical information on parking, entrances, etc.
- Note any items attendees should bring with them to participate.

- Encourage members to share accessibility needs or ways you can help them successfully participate.
- How and when you will share handouts and PowerPoint slides from the meeting. For virtual meetings, send needed handouts beforehand.

## 9. Brand your event

Position your event properly within PEAK brand standards:

- Download, customize, and use branded PowerPoint templates to promote PEAK and give your meeting a professional look. **The template is available here.**
- Promote membership and involvement in PEAK and the peer network!
  - Share the benefits of volunteering with PEAK by sharing your personal story and encouraging members to become volunteers.
- Provide a quick overview of PEAK, upcoming peer network events, and the benefits of individual and organization membership.

PEAK will attempt to ensure that a staff or board member is present at every peer network educational event.

Please allow time for a brief update from PEAK Grantmaking national.

Staff is available to help in other ways, as needed. Don't be afraid to ask!

## 10. Follow up with participants

To ensure everyone involved remains engaged, don't forget to:

- Thank your speakers.
  - Send a handwritten note or email a personal thank you to the speaker for presenting.

# Meeting Resources

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- Thank your volunteers.
  - Send a handwritten note or personal email thanking each volunteer.
  - If possible, provide information about upcoming volunteer opportunities.
- Thank your participants.
  - Ask all participants to complete a short online evaluation of the event.
  - Allow participants to remain anonymous on the evaluation.
- Send any handouts/presentation slides electronically.
  - Include information about upcoming events.
- Send a follow-up reminder to complete the evaluation.
- Send follow-up information to the PEAK team.
  - Include onsite registration forms and the sign-in sheet.
  - Include pictures of the event for PEAK Grantmaking to post on social media.
  - Provide a recap of the event for a PEAK blog post.
- Reach out to individuals who expressed interest in volunteering with the peer network.
  - A personal email or phone call will go a long way to making the individual feel valued and welcomed to volunteer!
  - Include a specific ask, whether it is to volunteer at an upcoming event or serve as a volunteer leader.

## Tips for Hosting Virtual and Hybrid Meetings

### Hosting Virtual Meetings

PEAK Grantmaking utilizes Zoom as our audio and web conferencing provider to offer virtual meeting opportunities for our members and peer networks. For all peer network virtual meetings, the chapter specialist and peer group specialist will create the event online and can be available to facilitate the technical aspects of the event or support volunteer leaders in running the meeting.

When hosting a virtual meeting, we recommend the following tips to ensure success:

- Find a quiet place with a strong internet connection.
- Host a rehearsal at least one day prior to your event to ensure you understand how to utilize Zoom, that audio is working, that you can share your screen/presentation (as needed) and that volunteer leaders and the PEAK team know their roles.
- Ensure that you have a backup facilitator for the meeting, in case there are tech challenges.
- Select at least one volunteer to be active in the chat with members.
- Plan to share housekeeping rules at the beginning of the meeting. (Consider questions like: Do you want folks to be on camera, if possible? How and when will you be offering time for questions, verbally and in the chat?)

### Hosting Hybrid Meetings

A hybrid meeting incorporates both in-person and virtual participation. There are two hybrid models: You may only use one host location with participants connected virtually, or you can use a hub-and-spoke model, with a main host location connected to satellite locations (hosting smaller/different in-person gatherings).

### At the Host Location

When searching for a host location for a hybrid meeting, be sure that the host location has the right software and equipment, such as the following examples:

- Computer for presenting
- Computer for projecting participant-view to all
- Projector
- Projection Screen
- Microphone
- Telephone
- Camera
- Strong internet connection
- Virtual meeting software

# Meeting Resources

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This will vary from foundation to foundation. It is important to understand what is available and how to use it, along with the limitations. Currently, PEAK utilizes Zoom, which is optimal for hybrid meetings.

## Tips for success at the host location

- Be sure to confirm the proper way to use the virtual meeting software with your host location and ensure someone will be available onsite to assist if any technical issues arise. Here are sample questions to ask:
  - What type of virtual meeting software do you use?
  - How will remote participants login? How will they listen to audio and communicate with the speaker?
  - How should I format and store the presentation to bring with me, and how will I access/share it during the meeting?
- Let the speaker know the setup in advance and ensure that the speaker understands how to use the software and equipment.
- Schedule a rehearsal to practice with the technology, speaker, and all satellite sites to ensure a smoothly and professionally run session.
- If a speaker is coming from out of town, consider hosting the rehearsal with those who will be running the technical aspects first and then walking the speaker through the process on the day of the event. (Plan for at least one hour before start time.)
- Create and share an annotated agenda, covering details on timing and coordination, with satellite sites.

## At the Satellite Locations

If hosting a satellite site for the hybrid meeting, make sure your satellite site foundation has the right software and equipment, such as the following examples:

- Computer for presenting
- Computer for projecting participant-view to all
- Projector
- Projection screen
- Microphone

- Telephone
- Camera
- Strong internet connection
- Virtual meeting software

## Tips for success at the satellite location

- Practice with the technology and host foundation to ensure a smoothly and professionally run session.
- Select a main facilitator for the satellite location.
  - This facilitator can be the main go-to contact during sharing and Q&As for communicating back to the main host.
  - Introduce the facilitator to the speaker before the meeting starts.
- Ensure you have the handouts early so that copies can be made for participants.

## PEAK Grantmaking Workshops and Facilitation Guides

The PEAK team supports our chapters by offering Principles-based workshops, presented by PEAK staff and planned in collaboration with volunteer peer network leaders. The PEAK team is excited to offer a new, streamlined list of offerings for 2024.

As we release suites of materials covering the **Principles for Peak Grantmaking**, we also create and share a facilitator's guide for peer network leaders to create programming centered on dialogue to drive courageous practice change.

**Drive Equity: How to be an Effective Ally and Employee**  
**DOWNLOAD**

**Walking the Talk: Lead with Values**  
**DOWNLOAD**

**Narrow the Power Gap: Rightsizing and Maximizing Flexibility**  
**DOWNLOAD**

# Meeting Resources

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## Sample Virtual Meeting Flow and Script

This is a sample flow and script for a PEAK Grantmaking peer network virtual meeting. For a successful virtual meeting, you should choose a peer network volunteer to act as the moderator (such as the chair or program chair) and a peer network volunteer to act as the technical facilitator to help with Q&A, watch the chat box, and record the session. The chapter or peer group specialist can also fulfill the role of technical support. If possible, please allow a couple of minutes for PEAK staff to share updates from the national association at the beginning of the webinar.

### Moderator Opening:

Good [Morning/Afternoon]! I'm [Name], [Position & Organization] and [Volunteer Role] of PEAK Grantmaking's [Chapter, Affinity Group, Caucus] peer network. Thank you so much for joining us for today's webinar, [TITLE]. PEAK Grantmaking's peer networks are committed to providing valuable learning opportunities for our members. We hope you enjoy today's session!

### Questions:

As you listen to the webinar, you will be muted to limit background noises and distractions. If you have any questions or comments to share during the webinar, please submit them through the chat box in your control panel and we will get to them throughout the webinar and during the Q&A portion at the end. Please note that we will be using the "raise hand" feature during this webinar.

### Announcements from the PEAK Grantmaking Team:

Before we get started, I'd like to turn it over to [PEAK staff member name] for a few quick announcements from PEAK National. They will go over a couple slides of announcements and turn it back over to you.

### Start Educational Programming:

Thanks, PEAK staff! Please stand by—this program is being recorded [5 second pause]. [PEAK staff will start the recording.] With that, the PEAK Grantmaking [affinity group, caucus, chapter] is proud to offer today's webinar [TITLE], which will be presented by [NAME].

[ADD SHORT BIO OF PRESENTER] Now, I'm happy to turn the session over to [NAME].

### Moderator Closing:

[Presenter presents. Volunteer facilitates Q&A. After all questions have been answered, the peer network moderator to close out the session.]

Thank you, [NAME], for teaching today's audience how to create a dynamic dashboard, and thank you to everyone who participated in today's webinar! We are glad you could join us and look forward to hearing your feedback. We will send you a follow-up email with a short evaluation which we encourage you to complete. Have a great day!

[Chapter or peer group specialist will stop the recording and end the meeting for all.]

# Meeting Resources

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## Guidance on Partnering with External Groups

By collaborating with regional associations of grantmakers and other philanthropy serving organizations (PSOs) such as affinity groups and regional associations, PEAK Grantmaking peer networks have the opportunity to:

1. Extend your reach and influence throughout the philanthropic sector.
2. Expand your network beyond your current membership.
3. Connect your members to new resources to develop their grantmaking expertise and implement better grantmaking practices.
4. Live PEAK Grantmaking's value of collaboration.

These guidelines are designed to help our volunteer leaders navigate potential collaborations. We want to ensure you are equipped to manage expectations and know when to consult PEAK staff.

Use this guide to help you determine whether the opportunity is mutually beneficial, to help you clarify roles and expectations, and to uphold PEAK's values and strategy.

### Collaboration Guiding Questions

There are many ways to collaborate. Here are a few examples:

- Cross-promoting events
- Sharing resources
- Cohosting events

PEAK Grantmaking staff and volunteer leaders may consider the following guiding questions before collaborating with another organization:

Is this opportunity mutually beneficial?

- Is the opportunity beneficial to both organizations?
- Do we have enough lead time to sufficiently promote this opportunity?
- Will this topic be of interest to our membership?
- Do we have the resources and capacity to be a good partner on this opportunity? If not, how will we get them?

Do we have shared expectations?

- Have we communicated our goals and expectations?
- Do we know our collaborator's goals and expectations?
- Do we share the same expectations? If not, can we find a compromise?

How are we communicating about this collaboration?

- How will we promote PEAK and our peer network throughout this collaboration?
- How will we debrief this collaboration and share lessons learned?

### Collaboration Guidelines and Checklist

These ground rules will get you started before you consider a potential collaboration.

1. Loop in our chapter or peer group specialist from the beginning.
2. Ensure you follow our brand guidelines when sharing any information publicly.

If you are considering cohosting an event, there are specific matters where PEAK staff will have the final say.

# Meeting Resources

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Check with the chapter or peer group specialist ahead of any planning calls or include them on any planning calls where the kinds of collaboration details outlined below are discussed. Specialists will know of any existing relationships with your potential partner organizations and can help you manage communication with regards to PEAK's ongoing relationships with these potential partners. Always refer any discussions that involve money or other PEAK resources (staff, products, registration lists, member lists, etc.) to the chapter or peer group specialist.

Setting clear expectations from the beginning is crucial to ensuring a positive experience. It's important to have a conversation with your potential cohost about each of the issues listed below. You'll want to identify and acknowledge where your goals and expectations overlap, and where they differ, from the beginning. For instance, if you will be working directly with a paid staff person, they may have tighter deadlines than you do as a volunteer.

Based on lessons learned from previous collaborations, we've put together a list of things you'll want to discuss with your cohost and agree to up front.

## **Cohosting an Event—A Checklist for Your First Conversation**

### **1. Agree on a timeline and project plan.**

Which person or organization will do what and by when? You'll want to decide how often to check in with the cohost leading up to the event. We recommend regular check-ins to ensure the project stays on track. You'll also want to agree on each planner's preferred mode of communication—email, phone calls, video conference, etc. Consider working with PEAK staff to outline the partnership expectations in a Memorandum of Understanding (MOU).

### **2. Determine how you will share event expenses.**

We encourage you to share all expenses incurred with your cohost to ensure a feeling of mutual buy-in. As always, any expenses that you incur on behalf of PEAK must be pre-approved by the chapter or peer group specialist. Here are some potential expenses that might come up:

- a. Catering
- b. Speaker fee or travel expenses

### **3. Determine who will manage event registration.**

It is important to explicitly discuss who will manage registration. This is a key issue because both organizations want to track the engagement of their members in the event. Our data privacy policies do not allow us to share membership data with another organization, and it is likely the collaborating partner also has a similar policy. Based on past experiences, we recommend one of two options:

- a. PEAK and the cohost organization each create separate registration pages for their respective membership. The number of available seats are shared. In this instance, you will need to coordinate closely to ensure that seats are filled as evenly as possible.
- b. Alternatively, PEAK can post the event registration and will offer the cohost organization a discount code for its membership to register at no cost.

### **4. Determine what registrant information you and your cohost will need to share** (such as name, organization name, email, dietary restrictions, etc.). If email addresses are shared, you'll want to determine how that information will be used in the future.

# Meeting Resources

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## **5. Decide how you will communicate with registrants.**

We recommend that each organization communicate with their respective membership separately. If you are sending joint communications, you'll need to put together a joint communications plan that outlines who will be sending what information and ensure that PEAK is accurately represented and our brand guidelines are followed. You should consider how each cohost will promote their organization before, during, and after the event.

## **6. Determine how you will evaluate participation.**

Each organization likely has its method for evaluating an event. Determine whether PEAK and the cohost organization will send one evaluation to all participants or separate evaluations to each organization's members. If your cohost is sending the evaluation, find ways to ensure PEAK's evaluation questions will be included and ask how we can access the results.

## **Cohosting an Event—During the Event**

During the event, you will want to ensure that both the cohost and your peer network are well represented. Here are a few things to consider:

- Dual logos on name badges, signage, and handouts.
- Introductions by peer network volunteer leadership, PEAK staff, and cohost representative.
- Closing and thank you remarks at the end by both organizations.

## **Cohosting an Event—After the Event**

After the event, remember to:

- Send a thank you message to your partner organization.
- Set up a quick meeting to discuss how the event went and future collaboration opportunities with the partner organization.
- Share feedback and lessons learned with chapter or peer group specialist and the peer network officers community.

# Volunteer Recruitment Resources

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Encouraging members to volunteer in your peer network is important because it helps create a more engaged community and a leadership pipeline to help sustain your peer network. Below is a guide to asking members to volunteer, along with lists of ideas to help potential volunteers get started on a leadership journey with PEAK Grantmaking and to help engage longtime/past volunteer leaders.

## Asking Members to Volunteer

Consistently, the most effective way to recruit volunteers is through a direct ask, especially from a peer. Here are tips to help ask members to volunteer:

- Ask the members questions about their skills, interests, availability, and goals.
- Pair your ask to volunteer with the members' interest.
- Start with a small ask and let your volunteer “work up” to bigger jobs at their pace.
- Share your enthusiasm and what you love about volunteering.
- At every event, highlight the benefits of volunteering and the available positions.
- Regularly recognize and thank volunteers at peer network events.

## Start Small

Ask members to help with specific tasks at each peer network event, such as:

- Welcoming guests and ask them to sign in.
- Helping set up the meeting space.
- Taking pictures at the event.
- Inviting colleagues to attend the event.
- Facilitating the discussion at their table.

## Create Committees

Creating committees is a valuable way to involve more members in the work of your volunteer leadership team and prepare members to assume a leadership position in the future. Common peer network committees include communications, program, and membership committees.

Feel free to create committees as volunteers become available—i.e., you may have an active program committee, even if you have not found volunteers for a membership or communications committee yet.

## Communications Committee responsibilities:

- Help draft messages to promote events and communicate event details to participants.
- Help strategize and implement ways to promote events and the peer network.
- Create branded meeting signs, name tags, etc.

## Program Committee responsibilities:

- Help plan events.
- Brainstorm topics and reach out to speakers for meeting venues.
- Help facilitate event discussions and icebreaker activities.

## Membership Committee responsibilities:

- Act as new member ambassadors and personally welcome new members to PEAK and the peer network each month.
- Help plan new member meetups.
- Help brainstorm and recruit potential new members.

# Volunteer Recruitment Resources

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## **Tips for general committee success:**

- Committee Chairs should regularly communicate with committee members.
- Meet on a monthly or quarterly basis via conference call or in-person to plan, check in on progress, and build camaraderie.
- Share updates and resources from PEAK which are relevant to your committee.
- Keep committee members engaged by assigning specific, achievable tasks on a regular basis.
- Recognize committee members at peer network events.

## **Engaging Longtime/Past Volunteer Leaders:**

- Speaking at an event: Ask longtime or past volunteer leaders to share their expertise by playing a role in peer network events. This might include:
  - Participating in a panel discussion on a hot topic.
  - Participate in a panel discussion on a hot topic.
  - Sharing their volunteer leadership journey with members to promote volunteering.
  - Discussing how to use PEAK resources like CONNECT.
  - Introducing speakers.
- Mentoring new volunteers: Pair a longtime or past volunteer leader with a new volunteer leader or committee member. This past volunteer leader can check in with a new leader over coffee or remotely via conference call on a regular basis.
- Serving in a past chair ex officio position for your volunteer leadership team: Past peer network chairs may be asked to serve as an ex officio, a position which provides guidance without casting votes.

# Volunteer Recruitment Resources

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## Volunteer Recruitment Email Template

### DOWNLOAD

**Subject:** Volunteer with [your PEAK affinity group, caucus, or chapter]!

[Name],

Our peer network is looking for dedicated, energized grants management professionals to join our volunteer leadership team! Our goal is to help grantmakers connect and develop our skills and knowledge to be more effective professionals.

By volunteering, you can help identify and plan meetings on topics of interest, get to know other professionals in the [region/affinity group or caucus identity space] and build your own leadership skills and resume.

We are currently looking to fill the following roles: [options below are included as suggestions]:

- Chair positions (membership chair, communications chair, program chair) to collaboratively lead peer network events and connections
- Committee members to help recruit and engage members, communicate and connect with the region, and plan events
- Members who can host local meet-ups at your office (preferably have technology to connect to other hubs virtually)

To get involved or learn more, please contact [affinity group, chapter, or caucus chair name] at [email].

We look forward to hearing from you!

The PEAK [name of peer network] Volunteer Leadership Team

- Name, Foundation, peer network Chair
- Name, Foundation, peer network Vice Chair/Cochair
- Name, Foundation, peer network Program Chair
- Name, Foundation, peer network Membership Chair
- Name, Foundation, peer network Communications Chair

# Membership Recruitment Resources

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## Sample New Member Welcome Template

**Subject:** A personal welcome to PEAK Grantmaking!

[First Name],

Hello, and welcome to PEAK Grantmaking! I am [insert name], a volunteer for the [affinity group, caucus, or chapter name]. I'm writing to introduce myself and officially welcome you to the peer network. I have been involved with PEAK for [how many years or months] and have found the network to be rich in information and generally fun folks.

Some of the best ways to get engaged are to participate in peer network activities online through the "CONNECT" community discussion board. We also meet in formal and informal settings to develop skills and increase our knowledge in the grants management field. Plus, you'll have an opportunity to create collegial relationships and friendships. I have found the network of people I've met through PEAK to be a wonderful resource for best practices and advice across a variety of topics.

Our [chapter/affinity group/caucus] typically meets at least twice a year and offers sessions on a wide range of topics. We offer much of our programming virtually so Zoom in to learn, share, and grow! We'll be sure to make introductions to get you connected with other grants management professionals. If there are any specific questions you have that spurred your joining PEAK or any introductions I can help facilitate, please let me know! I'm happy to introduce you to other people doing similar work or using the same grants database in case that's of interest. Also, we're always interested in learning what our members would like to learn more about. If you have ideas for topics for our local chapter meetings, please share!

We have a meeting scheduled for **[Month, Day at XX:XX x.m.]**. Please be on the lookout for a survey regarding events in the next few weeks. We would appreciate your insight on what you would be interested in discussing and learning about.

Again, welcome to PEAK Grantmaking! We look forward to welcoming you soon at our next member event or talking with you via the online chapter discussion board. In the meantime, please feel free to reach out to me or anyone on the leadership team with any questions.

Best,

[Name, Foundation, Position]