



PEAK Champion Guide



No organization can thrive without its champions!

For PEAK Grantmaking, that's our staff, board directors and alumni, and our chapter, peer group, and committee leaders. You represent PEAK as a leader of this organization.

As a PEAK ambassador, you are empowered to

- promote equitable, effective grantmaking practices and commitment to the Principles for Peak Grantmaking;
- showcase the value of being a PEAK Grantmaking member;
- recruit and welcome new members to our community and to the sector; and
- encourage investment in PEAK Grantmaking through Organization Membership, Sustaining Organization Membership, partnerships, sponsorships, and grants.

To prepare you, this guide provides high-level information, talking points, and answers to make anyone a successful PEAK ambassador.

As one of our champions, we thank you for your leadership, your dedication, and the work you've put into making our organization amazing!

For questions, please reach out to Sara Richman Sanders at sara@peakgrantmaking.org or 202-888-5396.

With gratitude,

The MCE team

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Note: We will update this guide periodically to ensure it's a fresh, accurate tool for you to reference the latest and greatest information about all things PEAK. If there's anything more that would be helpful to add or update, please contact Membership and Community Engagement Director Sara Richman Sanders at sara@peakgrantmaking.org.

This guide was last updated on March 28, 2024.

■ PEAK's Strategic Framework

PEAK: What's in a name?

Our “P” is for **Principles**, as the guiding force behind grantmaking practices becoming more equitable. Our “E” is for **Equity**, which lies behind all that we do and all that we are trying to advance. Our “A” is **Advocacy**, for the work PEAK does advocating for our people, grants management, and the sector. And finally, our “K” is **Knowledge**, affirming our dedication to learning and sharing through programs, resources, networks, and insights that support our members in building the skills for both their role and their career.

Vision, Mission, and Purpose (Theory of Change)

Vision

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

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.

Purpose (Theory of Change)

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.

PEAK's strategic framework unveiled in 2021 puts forth a dynamic blueprint for PEAK's next chapter—identifying four anchors by which to define our goals and guide our work in the years ahead:

From Grants Management Professional to Change Agent for Equitable Practices

Our members stand at a critical nexus point within philanthropic institutions, poised to lead change within their organizations and for the field. We will support and empower our expanding network in raising their voices as change-management practitioners to influence shifts in grantmaking practices.

Emergent Learning Community as Core Philosophy

Our peer networking structure positions us well to create an emergent learning community around our Principles work—shifting from a traditional, linear learning environment toward a more adaptive learning process that is continuously evolving based on the complexity of the issue and the experience of participants.

New Models for Growth and Sustainability

We will develop new revenue development models that expand organizational memberships in key areas and ensure that large-asset institutions are gaining value through membership. A new, customized member-services model will allow us to more deeply engage with members who are ready to build and embed equity into their operations.

Strategic Partnerships Extend Reach and Influence

We will accelerate and advance learning, demonstrate thoughtful alignments and collaborative thought leadership, and center our grants community as change leaders for the sector.

Learn more about our values and commitment to equity.

Principles for Peak Grantmaking

Created by and for our members, the Principles for Peak Grantmaking are our call to action for transforming the practice of philanthropy into the practice of principled grantmaking. It's time to move from conversation to action, and we believe grants management professionals can lead the way with this values-driven, equity-centered, practice-based road map for change.



- **Tie Practices to Values:** Link grantmaking practices with grantmaker values, integrating values throughout every aspect of grantmaking to propel the mission.
- **Narrow the Power Gap:** Use practices and policies to help narrow the power gap between grantmakers and grantseekers, and value equally the resources each brings to the partnership.
- **Drive Equity:** Build grantmaking practices and policies that minimize bias and support decisions that promote justice, inclusion, and equity.
- **Steward Responsively:** Manage all entrusted resources—people, finances, reputation, time—with care to balance stewardship with an agile approach to risk.
- **Learn, Share, Evolve:** Contribute to building sector-wide knowledge and seek wisdom from others pursuing change and impact.

Our Story

PEAK Grantmaking is leading the charge to change philanthropy into the practice of principled giving by fostering a growing membership community of 8,000+ philanthropy professionals and 500-plus funding institutions dedicated to advancing equitable and effective grantmaking practices and transforming the way grants get made.

Our Story

The member-led PEAK Grantmaking organization began in New York City when two grants managers started meeting informally to discuss experiences at their foundations. Soon, they engaged other colleagues and, as membership grew, an open and participatory network developed. We give special thanks to our members, Margaret Egan, Ann Gael, Orneata Prawl, and Ursula Stewart.

With support from the Rockefeller Family Fund, the organization established itself nationally in 1996 as Grants Managers Network (GMN) and incorporated as a 501(c)(3) public charity in 2006.

In 2017, GMN became PEAK Grantmaking to more boldly and persuasively convey the strategic value of grants management professionals and practices in realizing philanthropy's full potential to fuel change for good.

Along with our amazing members, we value the consultants, vendors, philanthropy-supporting organizations, and other partners who collaborate with us and serve our membership, helping to drive equity, foster community, and create change agents for philanthropy.

Our Community of Changemakers

By the numbers

550+

contributing Consultant and Organization Members

2,500+

organizations in our network

8,000+

philanthropy professionals in our network

350+

volunteers

150+

peer network leaders

40+

Journal and insights contributors

75+

committee and council members

100+

speakers and content presenters

A snapshot of contributing Organization Members

53%

private/independent foundations

17%

public charities/ other nonprofit grantmakers

9%

corporate giving programs/ foundations

8%

community foundations/DAF

6%

consultants/ philanthropic advisors

3%

philanthropy-supporting organizations/ funder networks

2%

government/public entities

1%

operating foundations

1%

limited liability companies

In 2023, our community connected:

1,200+

PEAK2023 participants

5,000+

peer network registrants

100+

GM101 cohort members

Job bands in our network

57%

professional positions

16%

supervisory/ management positions

14%

business support positions

12%

executive positions

Sustaining Organization Members

Thank you to the following organizations which have generously contributed funding above and beyond their annual membership dues, making it possible for PEAK to conduct research and build tools that support this amazing community in advancing equitable, effective grantmaking practices.

Annenberg Foundation
 Archstone Foundation
 Arcus Foundation
 Bainum Family Foundation
 Ballmer Group
 Bill & Melinda Gates Foundation
 Bloomberg Philanthropies
 Blue Cross Blue Shield of North Carolina Foundation
 Charles H. Dater Foundation
 Energy Foundation
 Fifth Third Foundation
 Ford Foundation
 Gordon and Betty Moore Foundation
 MacArthur Foundation
 May & Stanley Smith Charitable Trust
 McKnight Foundation
 Meyer Foundation
 Poetry Foundation
 Robert Wood Johnson Foundation
 Skoll Foundation
 Stupski Foundation
 The California Wellness Foundation
 The Commonwealth Fund
 The Nathan Cummings Foundation
 The Wallace Foundation
 Walton Family Foundation
 Wellspring Philanthropic Fund

Finding Your People in Our Network

PEAK Grantmaking encourages grants and operations professionals to network and build skills, knowledge, and expertise together; share effective, equitable grantmaking practices; and support each other in the nonstop work of changing philanthropy. Here are the current and emerging communities we are building with our members and partners.

Chapters

PEAK has 14 regional chapters led by volunteer leaders from the sector. Every chapter hosts at least one educational event and one networking event each year.

[Learn more.](#)

Caucuses

Our **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's identity.

- **PEAK Black Caucus**, for those identifying as Black, African American, or African
- **PEAK Latinx Caucus**, for those identifying as Hispanic, Latino, Latina, or Latinx
- **PEAK Asian American, Native Hawaiian, and Pacific Islanders (AANHPI) Caucus**, for those who identify as Asian American Pacific Islander
- **PEAK LGBTQ+ Caucus**, an exploratory pilot group for those who identify as lesbian, gay, bisexual, transgender, queer, questioning, asexual, intersex, or two-spirit

Affinity Groups

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.

- **Small Foundations Affinity Group**, for all PEAK members who work at small-staff foundations
- **Intermediaries Affinity Group**, an affinity group for grants management professionals who work at intermediaries

- **Grants Management Directors' Circle (GMDC)**, for senior-level grants management leaders at high asset foundations (This is a facilitated group supported by members of the Circle; participation is exclusive to PEAK Organization Members with assets of at least \$2 billion and an annual grants budget of at least \$100 million).
- **Grants Management Peer Experience (GMPE)**, for the grants management teams of GMDC member organization, meets biannually to discuss topics chosen by its members.

Pilot Mentoring Program

In 2021, we launched a pilot mentorship program in collaboration with the PEAK Northeast chapter in memory of Orneata Prawl, one of PEAK's beloved founding members and an early chapter volunteer leader. After a successful first year concluded in 2022, PEAK is launching a second iteration with PEAK New England, which will run from July 15, 2024 to July 15, 2025.

Virtual Learning Cohort: Grants Management 101

Grants Management 101 is an interactive virtual learning course designed to dive deep into the fundamentals of grants management, the philanthropic sector, and equitable, effective grantmaking practices. The program features in-depth discussions and small cohort convenings that provide participants opportunities to further connect with peers, explore content more deeply, receive coaching, and work towards career growth goals.

LEAD Cohort

Learning to LEAD Together (LEAD) brings together a small group of diverse, dedicated PEAK volunteer leaders who aim to level up and 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 team-building experiences to support participants powerfully. The tools and frameworks shared in each session are transformative. Participants build a community together in a nurturing way to share successes and challenges long after the program ends.

■ Grants Management Career Development Resources

PEAK Grantmaking is committed to advocating on behalf of the grants management profession and providing those in the field with tools to develop their skills, expertise, and knowledge, as well as to advocate for themselves at their home institutions.

Key career development resources include:

- Our **Grants Management Salary Report** providing detailed salary data by grantmaker asset and type, job band, race/ethnicity, and gender identity. The report also includes information about workplace benefits and practices.
- Our **Grants Management Professional Competency Model** defining the professional knowledge, skills, and abilities expected of grants management professionals, regardless of your area of specialization, the size of

your organization, or your role within the field. By identifying both the functional responsibilities and the knowledge needed for success in every area of grants management, the Model provides a comprehensive look at the profession, offering everyone working in grants management a pathway to professional success.

- The nineteenth edition of our *PEAK Grantmaking Journal*, **Career Journeys in Philanthropy**, in which our members share their own career experiences and explore how they're moving within the field to grow their skills, assert their leadership, and rise up as leaders of change to push, pull, and sometimes drag the field forward.

■ PEAK Grantmaking Journal

In 2020, PEAK relaunched its premier member magazine, *PEAK Grantmaking Journal*. Our bold new flagship publication, available in print and digital formats, delves into critical areas of practice—inviting thought leadership from across our community (and beyond) that challenges us all to rethink norms and transform practices.

Here are the most recent editions:

- **Learn, Share, Evolve**
- **PEAK's Emergent Learning Playbook**
- **Driving Racial Equity in Philanthropy**
- **Career Journeys in Philanthropy**
- **Reimagining Grantmaking**
- **Black Voices in Grants Management**



Annual Convening

Each year, PEAK convenes over 1,000 individuals in person and online for a collective emergent learning journey toward more equitable, effective grantmaking.

Over three days in March, we'll lift up stories and insights from across the PEAK community, and explore ways that members are leaning into each of our five Principles to be active change agents for philanthropy. [Learn more.](#)

Financial Overview

Alongside the funder's perspective, we must center the voices of PEAK and other nonprofits so that we can make a lasting impact on the sector. We're building a movement based in a carefully crafted member experience that is inclusive, well-curated, and uniquely PEAK. We're able to achieve that "high polish" effect, capable of shining throughout the sector, because the core board leaders

who are driving our work are deeply rooted in equity, abundance, and collaborative leadership. We know that PEAK must thrive using the same, deep principles that now guide our members. As Vu Le says, "Fund the People;" PEAK's core staff is wholeheartedly invested in the programs, resources, and volunteer engagements building to PEAK's next chapter.

Income	2024 Budget	2023 Budget	2022 Budget
Earned Income	\$2,835,539	\$1,439,750	\$1,034,916
Contributions	\$5,435,000	\$4,261,250	\$4,378,750
Total Income	\$8,315,539	\$5,746,000	\$5,458,666

Expenses	2024 Budget	2023 Budget	2022 Budget
Programs	\$4,684,778	\$3,341,879	\$3,220,930
Membership	\$1,683,777	\$1,297,320	\$1,133,310
Operations	\$2,374,533	\$1,311,748	\$1,201,023
Total Expenses	\$9,474,710	\$5,950,948	\$5,555,263
Adjusted Net Income	\$3,040,829	\$295,052	\$603,403

Please note: income and expenses listed above are given to provide you an overview of our budget. Not all items are included. Total income and expense show the actual anticipated totals.

■ Partnering With PEAK Through Investment

PEAK Grantmaking is a nonprofit organization. We rely on funding from our investment partners through Organization Memberships, sponsorships, and grants, as well as through fees for events and products.

To continue as a sustainable organization and build our capacity to support our members and advocate for courageous practice change in the philanthropic sector, we encourage members of our community to invest in PEAK in the ways that work best for their organizations.

We believe in friend-raising, not just fundraising.

We strive to develop transformational, mutually uplifting, and beneficial relationships with our partners—grantmaking organizations, vendors, consultants, and peer philanthropy-supporting organizations whose values and missions align with ours.

Opportunities to Invest in PEAK

Organization Membership

- Champion courageous practice change in philanthropy. As a contributing PEAK Organization Member, you'll join more than 500 peer grantmaking organizations who are leading the way to advance equitable and effective grantmaking practices.
- Dues are based on total annual giving and currently range from \$500–\$10,000.
- Organization membership is open to all types of grantmaking organizations and philanthropy-supporting organizations.
- Consultants may also join as Consultant Members. Dues are based on the total annual giving of clientele.

You and your entire team gain all-inclusive access to our complete range of benefits, including exclusive access to PEAK's on-demand webinar library and Principles for Peak Grantmaking how-to guides.

For additional information, including a pricing breakdown by organization type, visit our website. Click [here](#) to apply when you are ready to become an Organization Member.

Please direct questions about Organization Membership to Senior Membership Manager Clare Larson at clare@peakgrantmaking.org.

Sustaining Organization Membership

- Our Sustaining Organization Members annually contribute funding above and beyond their stated membership dues, making it possible for PEAK to conduct research and build tools that support this amazing community in advancing equitable, effective grantmaking practices.
- Any Organization Member or Consulting Member is welcome to become a Sustaining Organization Member by contributing additional support.
- Some Sustaining Organization Members contribute an additional \$2,000 while others give \$25,000 in membership contributions.

Sponsorship

- We invite you to demonstrate your commitment to equitable, effective grantmaking and the PEAK community by supporting our programming or our annual convening, which is the largest convening of grants professionals in the US.

Grants

- PEAK seeks meaningful partnerships that help to realize our respective missions and visions.
- Unrestricted general operating support grants are crucial to help bring PEAK into our next chapter by increasing our capacity and becoming a tech-forward organization, in line with our member organizations.

Personal Contributions and Matching Gifts

- We have launched an online donation portal where individuals can easily make one-time or monthly contributions to PEAK without logging in or creating an account.
- The portal features a wall of our latest donors.
- We encourage anyone who gives to PEAK Grantmaking to consider making the most of their contribution by asking their organization to match the gift.
- **[Access the portal here.](#)**

■ Introducing Someone to PEAK

Individual Membership

- Professionals who work at grantmaking organizations and philanthropy-supporting organizations who are new to PEAK are invited to join at no cost as an **Individual Member**.
- We hope that as individuals engage with us, they will consider becoming a contributing Organization Member.

Vendors and Consultants

- Share our **annual report**. Talk about who we are as well as who our members are and what they do. If you think you've found a potential partner, contact the PEAK team about setting up an e-introduction.

■ Volunteer Opportunities

PEAK thrives on our member community's commitment to active volunteerism and mutual support. Each year, over 350 individuals contribute their talent, time, enthusiasm, knowledge, and dedication to serving in a variety of volunteer roles from leading our peer networks, speaking at events, and sharing innovative ideas for our convening to serving on our board, providing guidance on resources, and contributing thought leadership.

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

Below is a comprehensive list of our volunteer opportunities:

- Affinity Group Steering Committees
- Advisory Councils
- Annual Convening Planning and Host Committees
- PEAK Board of Directors
- Board Committees
- Board Nominating Committee

- Caucus Steering Committees
- Chapter Steering Committees
- Focus Groups
- Insights Contributors
- *Journal* Guest Editors and Contributors
- GM101 Cohort Advisors
- Mentorship Pilot Program
- Speakers

We have multiple openings throughout the year. Check out our new **Volunteer Board** for current opportunities. Reach out to Senior Community Engagement Manager Altinay Cortes at **altinay@peakgrantmaking.org** with questions about volunteering and to discuss the right fit for new and returning volunteers.

■ Quick Links for PEAK Champions

Supporters: Thank you to our many supporters whose partnership and generosity enable PEAK to advocate and educate for more equitable, effective grantmaking practices and advance the grants management profession. This page lists our grant partners, sponsors, and exhibitors.

Organization Members: Thank you to our amazing Organization Members for championing courageous changes in practice, advancing the grants management profession, and supporting the work of PEAK.

Annual Reports

- [2022 | Our Community of Change Agents](#)
- [2021 | Our 25th Anniversary Year](#)
- [2020 | Meeting the Moment](#)
- [2019 | Courage in Practice](#)

Financials: Access our latest audited financial statement and 990.

Principles for Peak Grantmaking: Created by and for our members, these Principles are our call to action to transform the practice of philanthropy into the practice of principled grantmaking. It's time to move from conversation to action, and you can help lead the way with this values-driven, equity-centered, practice-based road-map for change.

Join Us: Ready to share with folks who are new to PEAK, this page explains the benefits of Organization Membership, Consultant Membership, and Individual Membership.

Our chapters: Learn about and connect with our 14 regional chapters.

Our peer groups: Learn about our affinity groups and identity-based caucuses.

Upcoming events: Check out upcoming events hosted by PEAK, our chapters, and our partners.

Donate to PEAK: Our online donation portal for individual contributions.

■ Get Social With Us

Follow us at @PEAKgrantmaking on LinkedIn.

There, you'll find posts about new PEAK resources and upcoming events, the latest insights from our community, new members, our "weekly reads" roundups, and news from our members and partners.

Join the conversation and introduce PEAK to your networks with likes, comments, and shares!

Add your PEAK volunteer service to your LinkedIn profile. Here's how:

- Log in to your LinkedIn profile.
- Scroll down to Volunteering experience.
- Click the + button.
- For Organization, find and select PEAK Grantmaking.
- Include your volunteer title, such as PEAK Northeast Cochair, Nominating Committee Member, or Board of Directors.
- Add start and end dates and a description, as relevant.

Credits: Photos by Julie Harmsen Photography, Greg Smith | iMediaSmith, and Kenton Waltz Photography