

PEAK 2025

Call for Proposals

Deadline: Monday, October 7, 2024

New Orleans | March 24-26, 2025

Onward: Leading with courage

Change begins with us, and each member of the PEAK community is an inherent leader. Although we continue to work hard to revolutionize grantmaking practices, we live in a moment that requires us to courageously lean into the headwinds that challenge us.

To this, we say: Onward! PEAK2025 is a call for our community to lean into those challenges, to build on our momentum, to see new possibilities despite the setbacks, and to constructively engage with our feelings of discomfort in order to dismantle systems that disenfranchise individuals and communities across our nation. We must be unwavering in our commitment to transforming philanthropy and upholding the ideals of fairness, trust, and truth. As individuals and as a collective, let's lead with courage and boldly move toward a future where justice and equity prevail.

Cocreate PEAK2025 With Us

To help our community and the sector at large press onward we need your best ideas to make PEAK2025 an inspirational and motivational event. With our five Principles guiding us, we'll foster an emergent learning experience that elevates how PEAK members are leading the way with innovations in grantmaking practice and encourages everyone to contribute to reshaping the sector. Center your proposal on what PEAK stands for: Principles, Equity, Advocacy, and Knowledge. Proposals should advance participants' thinking on critical issues, engage and feature diverse perspectives, embrace new ideas, and provide insights and resources. In addition, design your session so that it takes a thoughtful approach to delivering an engaging experience for attendees.

Bring your energy and insights to help make this a can't-miss event for our community and the best convening any of us will attend in 2025 in New Orleans next March!

Deadline: Monday, October 7, at 11:59 p.m. PT

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Eligibility to Present

PEAK Grantmaking seeks to feature those who represent a diverse range of perspectives and experiences and who actively work to elevate grants management as a role and function, operationalize equity-centered grantmaking practices, and advance the philanthropic sector. We welcome proposals from anyone who considers themselves part of the PEAK community, including staff and board members at funding institutions and nonprofit organizations, consultants, philanthropy-supporting organizational partners, and vendors who support our mission to transform philanthropy.

Audience

PEAK's membership consists of over 500 organizations representing a mix of large and small funding institutions. A significant portion of convening attendees are from smaller private foundations where they may be the only person with grants management responsibilities. We expect approximately 1,000 attendees who collectively reflect the diversity of PEAK's community of more than 8,000 philanthropic professionals specializing in grants management, information technology, programs, operations, knowledge and learning, research and evaluation, partnerships, development, communications, and human resources.

The majority of PEAK's members are grants management professionals seeking content focused on effective grants management practices, inspirational case studies, competency development, and key strategies for aligning their institution's practices with the **Principles for Peak Grantmaking**. However, attendees' professional experience levels span from early-career roles to executive-level positions, so our goal is to ensure balanced programming that covers both the more advanced and aspirational elements of this work as well as the core fundamentals.

Content Focus

The overarching theme of this year's convening is the call to move onward and lead with courage. We invite you to cocreate an experience with us that will inform, excite, empower, and engage participants to fully embrace their leadership capacities and be emboldened to face the thorniest situations to realize a philanthropic sector governed by equity and justice. Working within this theme, session proposals must align with one of five session tracks, each of which reinforces what PEAK stands for: Principles, Equity, Advocacy, and Knowledge.

Principles: These are the Principles for Peak Grantmaking:

- **Tie Practices to Values**
- **Narrow the Power Gap**
- **Drive Equity**
- **Steward Responsively**
- **Learn, Share, Evolve**

Equity: Equity underpins all that we do and all that we are trying to advance.

Advocacy: PEAK advocates for our people, grants management, and the sector.

Knowledge: Knowledge—and the pursuit thereof—supports our members in their roles and careers through hands-on skill building, sharing personal experiences, and exploring how emergent learning is a key element in professional and organizational success.

PEAK2025 Session Tracks

We have five distinct tracks to help shape the content of this year's convening:

- **Change Agent:** The PEAK community is fortunate to have change agents who are poised to influence shifts in grantmaking practices within their organizations and throughout the sector. As we seek to activate each member to go beyond being good in their role, these sessions and workshops will focus on issues such as getting a seat at the table, shifting from transactional doers to transformational leaders, and elevating the role and function of grants management regardless of the title you have. Here are a few examples of session ideas:
 - Change management
 - Bringing board members and donors along the journey toward equitable grantmaking
 - Building trust and sharing power with community
 - Embedding equity, inclusion, and racial justice into practices
 - Building cross-sector partnerships for policy and systems change
- **Learning Lab:** Devoted to the technical art of grants management, each session in this track is a toolbox for beginners and veterans alike. Sessions and workshops will range from the basic aspects of grants management to exploring the complex and constantly evolving financial, legal, and IRS-related issues impacting grants management. Here are a few examples of session ideas:
 - Reimagining the vetting process and increasing accessibility
 - Next-level practices for streamlining applications and reporting to reduce burden
 - Operationalizing the Principles for Peak Grantmaking
 - Risk management
 - Project management strategies
 - IRS regulations and laws impacting the sector
 - How to approach international grantmaking, intermediaries, and fiscal sponsorship
- **Transformative Funding Strategies:** There are so many choices when it comes time to decide how to support an organization, and funding 501(c)(3) organizations is no longer the only option when determining how to effect change in our communities. Sessions and workshops in this track will highlight how grantmakers have reimagined their limitations and are evolving their processes to have greater impact. Here are a few examples of session ideas:
 - Investing beyond the grant
 - Funding policy advocacy, 501(c)(4)s, and grassroots organizations
 - The impact of policies and politics on grantmaking
 - Program- and mission-related investments
 - Comparing and contrasting funding strategies for urban and rural communities
 - Giving circles and other funder collaboration strategies
- **Harnessing Data and Technology:** Grantmaking organizations gather a lot of data during the life of a grant, starting with identifying potential grantees and the application process. Sessions and workshops in this track will center on all things related to data, from collecting it to making sense of it to using or reusing it. Here are a few examples of session ideas:
 - Unlocking the power of artificial intelligence
 - Storytelling with data and data visualization
 - Creative approaches to evaluation and measuring impact
 - Knowledge management, meaning making, and utilizing qualitative and quantitative information gathered throughout the grant life cycle
 - Becoming more responsive to community needs by leveraging and making more accessible data and technology
 - Creating effective dashboards, reports, and dockets for the board

• **Professional Growth and Wellness:** As working professionals, continuously developing and honing skills while maintaining work-life balance is challenging. Sessions and workshops in this track will help attendees navigate tricky situations in the workplace, set boundaries, identify allies and advocates, and take on leadership roles regardless of what their job title might be. Here are a few examples of session ideas:

- Values-aligned leadership
- Collaborating with peers and managing up, down, and across the organization
- Career pathways within grants management and beyond
- Advocating for career advancement and equitable pay
- Creating more equitable, human-centered organizations

Session Formats

We aim to create an inclusive and interactive PEAK2025 convening that is accessible to attendees with diverse identities, backgrounds, abilities, and learning styles. With each session, our goal is to meet attendees' learning objectives while creating space for making new connections. There are four session formats: open fishbowl, spark talk, world café, and workshop models. Each session (except the 30-minute spark talks) will have a 75-minute time slot that should include 15 minutes for Q&A with the audience.

Open Fishbowl (75 minutes)

Engage the entire room by inviting attendees to dive into the conversation! Start the session with a 30-minute presentation followed by 45 minutes of engaging conversation with attendees. A conversation moderator, identified in the proposal, will then facilitate the conversation and transition members into and out of the "fishbowl." Those in the "fishbowl" will discuss the topic while the rest of the audience will take in the

conversation, taking turns between the two roles to practice both contributing and listening. The moderator will ensure attendees join the conversation as they have questions or want to contribute and engage. You can learn more about the fishbowl methodology [here](#).

World Café (75 minutes)

Join the jet set! Select a topic, put attendees in small tour groups, and have them transition around the room to areas where they'll respond to questions on tables that explore the topic in greater depth. Each area will feature a unique question for attendees to consider and build on with each transition. You can learn more about the world café methodology [here](#).

Workshop (75 minutes)

These sessions provide attendees with practical tools and approaches to their work and can be structured as a presentation, a how-to session, or a panel. Sessions should be designed with some interaction in mind, such as breakout discussions, polling, open discussion, or other activities. Workshop sessions focused on skill building should be practical in nature and develop competencies essential to grants management professionals. Proposals for substantive topics can be submitted as a two-part series. If you wish to present a series, please submit one proposal that covers both sessions.

Spark Talk (30 minutes)

Up to two speakers will speak on a selected topic and spark discussion among attendees. These sessions are a great way to highlight a specific idea, recommendation, or case study. With a condensed amount of time, presenters should limit the number of slides used (if any) and consider carefully how any visuals such as a compelling chart or image will advance the discussion.

Application Process

Register to attend an **information session on Wednesday, August 28, at 3:00 p.m. ET** and an **open office hour on Tuesday, September 10, at 12:00 p.m. ET**. During these sessions, staff will answer questions on the call for proposal application, session tracks, and other questions from participants. Attending the information session or open office hour event is not required to apply. Are you interested but unable to attend? Sign up anyway—both sessions will be recorded and made available to all who register.

We are using the Cvent speaker management platform for the proposal submission process and to communicate with speakers about their sessions.

The proposal submission form requests information, including the session's title, description, outline, and learning objectives; the diverse perspectives the speaker(s) and content bring to the convening; how you consider inclusivity and accessibility in the session design; and how the session aligns with the convening theme and the session tracks.

Applicants will need to supply the name, title, affiliated organization, and several demographic details on each of the speakers when submitting a proposal. Additional speakers or roles developed after proposal submission will need to be discussed with PEAK staff and approved. Note that in previous years, session proposals that included more than one speaker were scored higher by the review team, and we encourage all applicants to include as much information on the presenters as possible.

Room capacity will vary depending on your session type. Consequently, your audience cap will range from 100 to 250 participants. This year, all sessions will be held for in-person audiences only and set in theater style (except world cafés) to maximize room capacities and ensure all sessions are accessible to attendees.

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Selection Process

PEAK2025 Planning Committee

Our PEAK2025 planning committee is composed of PEAK member volunteers who have extensive knowledge of PEAK and its membership, the grants management profession and philanthropic sector, and the convening's key session themes and learning tracks. [View the list of committee members here.](#)

The session selection process involves a highly rigorous review of every proposal received. The planning committee, in partnership with PEAK staff, will make recommendations for selections and assist in planning other educational activities for the convening. We anticipate receiving more session proposals than can be selected and commit to exploring other platforms for sharing proposed content. Selection decisions are based solely on the information submitted, so please follow the instructions carefully and supply all requested information. Missing or incorrect information could make the proposal ineligible for consideration. Remember to identify all presenters and include as much information as possible to help the committee fully consider the session's potential.

The PEAK team will also proactively invite sector partners and members to submit proposals to ensure that topics of importance to our mission and the work and voices of those we want to uplift are represented.

Each individual or organization may submit only one proposal. If you are with a large organization, please coordinate with your colleagues to ensure that the best idea is submitted. Please consider including presenters in your session who are not a part of other proposed sessions so that we can assure new and diverse perspectives are included across the full program. When selecting presenters, please confirm with them that they are not already committed to another session. This helps us ensure new and diverse perspectives are included across the entire program.

Your proposal may have a maximum of four speakers, with the exception of spark talks, which have a maximum of two speakers.

Selection Criteria

Your proposed session must clearly apply to PEAK's target audience, support the overarching convening theme, and align with what PEAK stands for—Principles, Equity, Advocacy, and Knowledge—and the session tracks. In addition, proposals will be evaluated using the following criteria:

- **Alignment with the Principles for Peak Grantmaking:** Does the submission exemplify any of the Principles for Peak Grantmaking and PEAK's road map for moving the sector from transactional to transformational grantmaking? Learn more about each of the Principles [here](#).
- **Equity:** Does the proposed session center equity in its approach and content?
- **Compelling and relevant:** To what extent does the focus of the proposed session advance thinking on a critical and timely issue in philanthropy? How well does the session connect to the convening theme or a specific session track?
- **Diverse perspectives:** To what extent does the proposed session highlight traditionally underrepresented or marginalized perspectives? Does the proposal feature speakers from a diverse range of backgrounds and communities? Does it feature an intersectional approach? Does the proposal introduce new voices, new concepts, or offer a fresh take on an issue? Does the proposal lift up voices from the PEAK community?

- **Action-oriented:** Is the proposed session likely to engage participants in a way that inspires a real-world outcome? Does the session encourage participants to lead within their organization, regardless of their title or seniority?
- **Desired impact:** Does the proposed session seek to impact individuals working in philanthropy, philanthropic organizations, or the sector as a whole?
- **Format:** Does the proposed session take advantage of a new way of presenting and leading? How does the session leverage the possibilities of the chosen session format?
- **Accessibility and Inclusivity:** Does the session consider carefully and support the inclusion of attendees across a wide range of identities, communities, backgrounds, abilities, and learning styles?

Sessions must be delivered by a speaker with substantial topic knowledge and experience facilitating dynamic learning experiences for large groups. PEAK continues to seek a balanced slate of speakers who are champions of PEAK's community and who represent diverse backgrounds, viewpoints, and organizational affiliations.

Selection Timeline

PEAK Grantmaking must receive completed proposals no later than 11:59 p.m. PT on Monday, October 7, 2024. Session selections will be confirmed in early November 2024.

If your proposed session is selected for the convening, PEAK Grantmaking staff and committee members may work with you to further develop the session. While we will try to honor your desired session type and track, we will determine which will best showcase your ideas.

Due to our focused priorities and limited time slots, we will not be able to accept every submission. There will be approximately 40–45 sessions at PEAK2025.

Convening Policies

Your Commitment to Speak

It is an honor and a privilege to be invited to speak at a PEAK convening. By sharing your expertise, you make a valuable contribution to the profession's field of knowledge and the learning of each participant. If you are selected, ensure you can deliver the session by securing the support of your organization and managing your workload to maintain your commitment. **If your proposal is approved, presenters must be available during all concurrent session time blocks over the three days.** We understand that things do happen and appreciate your advance notice in the event of extreme circumstances that prevent a presenter from attending. For solo presenters, we encourage you to have another person prepared to deliver the session as a backup plan. All speakers must sign our speaker agreement.

By committing to present at PEAK2025, you also agree to meet the following requirements:

- PEAK Grantmaking reserves the right to edit the presentation (e.g., slide design and composition, session title, and session description) to maximize the effectiveness of the session and its communication and promotion potential.
- Attend the speaker orientation session where we will cover responsibilities and accountabilities and provide more information about our **Principles for Peak Grantmaking** and organizational values.
- Presenters must use the PEAK2025 slide presentation template.
- Eliminate any form of direct promotion of a product, service, or monetary self-interest. PEAK2025 is a convening that seeks to build on the wisdom and experience of practitioners in the field, and as such must be noncommercial in content and delivery.
- PEAK seeks to create an inclusive, brave space for all attendees with diverse and intersecting identities. Please help support our efforts to create a community of practice and learning and refrain from overt statements, harsh language, or pointed humor that disparages the rightful dignity, inclusion, and social equity of any individual or group.
- Sign and submit a PEAK2025 speaker agreement form confirming your agreement to these terms.

Registration and Travel Expenses

PEAK Grantmaking is a nonprofit membership association with a responsibility to its members to carefully manage its resources.

For this year's convening, we will offer speakers a discounted registration rate of \$1,000 until December 31, 2024. To receive the discounted registration rate, the name of the presenter should be given in the proposal or, at minimum, the specific presenter role. Additional presenters or roles developed after proposal submission may not be eligible for the discounted registration rate and will need to be discussed with PEAK staff.

If the registration rate is not financially feasible for any PEAK member or partner, we will work with them to ensure they are able to attend. Speaker stipends and additional support for participation in PEAK2025 will be considered on a case-by-case basis and upon request.

Questions

For questions related to session development, please contact PEAK Senior Knowledge and Learning Manager Vanessa Elkan at vanessa@peakgrantmaking.org or by phone at 202-470-1846.

For questions and assistance with troubleshooting Cvent please contact PEAK Knowledge and Learning Manager Alberto Espinoza at alberto@peakgrantmaking.org or by phone at 202-588-3251.

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