



Principles for
Peak Grantmaking

COURAGE IN PRACTICE

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EXECUTIVE SUMMARY

Many in our sector are talking about big ideas such as equity and inclusion, narrowing the power gap in our sector, being authentically engaged in our communities, listening and learning from our partners, and living our values in our practice.

We can help the sector move beyond conversation to action.

We believe our members have the power to bring tangible, real-life, and practical implementation to these big ideas to build a bridge between strategic vision and action. To this end, we support their professional growth through developing the competencies that will help them lead this change.

We are developing and delivering tools and resources to help grantmakers:



Tie Practices to Values

by thoughtfully examining how values are reflected in practices and ensuring consistency between what a funder says and what it does.



Narrow the Power Gap

by using 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

by building grantmaking practices and policies that minimize bias and support decisions that promote justice, inclusion, and equity.



Learn, Share, Evolve

by contributing to building sector-wide knowledge and seeking wisdom from others pursuing change and impact.



Steward Responsively

by managing all entrusted resources—human, financial, reputation, time—with care to balance stewardship with an agile approach to risk.

Learn, Share, Evolve by contributing to building sector-wide knowledge and seeking wisdom from others pursuing change and impact.

Steward Responsively by managing all entrusted resources—human, financial, reputation, time—

Our call to action for our members (and all those in philanthropy) is to:

- ▲ Engage with their peers to learn together,
- ▲ Build their expertise in key competencies needed to implement change, and then follow through to
- ▲ Implement better grantmaking practices

Through a courageous commitment to these actions, we are working to bring big ideas to the front lines of grantmaking.

PHILANTHROPY'S POTENTIAL

Philanthropy aspires to make a critical difference in the lives of its ultimate beneficiaries through the organizations and agencies that do life-changing work. PEAK Grantmaking believes that philanthropy can live up to its best potential by taking a more principled approach to its grantmaking practices.

Grantmaking practices—the steps funders take to effectively, efficiently, and equitably mobilize resources to achieve shared goals with grantees—are central to the success of grantmaking institutions and the causes, organizations, and people they support. In fact, our research shows that 90 percent of funders reported understanding and valuing the connection between practices and results. However, research by PEAK Grantmaking and others shows significant gaps between understanding and action.

We believe that philanthropy has the potential to:

Root its practices in values to improve grantmaking. Funders report that when they align values with practices, they are more consistent and strategic in their decision-making. They report that acting from their values leads to better relationships with grantseekers, a better fit between grantseekers' funding priorities and their own, and more efficient application and reporting processes. However, when funders ranked their organizations on how well practices align with values, the average score was "C minus."

Build trust-based relationships. Trust emerged as an important theme in nonprofit interviews and focus groups in PEAK Grantmaking's 2008 *Drowning in Paperwork, Distracted from Purpose* research. Examples of common practices that undermine trust include restrictions on the use of funds, little or no response to grant reports submitted to funders, and lack of flexibility in grant requirements. This lack of trust is particularly undermining because research has shown that nonprofits value clear communication and forthright relationships above all else in their interactions with funders.

Reduce and eventually eliminate inequitable grantmaking practices. Decision-making often comes from outside the communities most impacted by lack of investment. Increasing the diversity among decision-makers has a ripple effect on how grants are made and which organizations receive them. However, only about half of all grantmakers collect demographic data on the communities or the leaders of the nonprofits they fund. If grantmakers don't collect and share demographic data on the organizations and communities they fund, then potential disparities in who receives funding are not apparent, and philanthropy's impact cannot be measured accurately. This data could drive strategies and action that bring more voices into decision-making and reduce bias.



Unlock the data, information, and knowledge held by each funder, for the benefit of all. All of the time and effort spent moving data and information from nonprofits to funders is a significant missed opportunity for philanthropy. The data remains siloed in each funder's grants management systems, accessible only to the individual funder. With a robust information infrastructure that enables sharing and use of information across the social sector, both funders and nonprofits could be more effective.

Increase the impact of the funding it's already giving. Every requirement placed on grantseekers shifts resources from mission-related work to fundraising. Between 2007 and 2015, time applying for grants increased from 20 to 24 hours per grant, and time reporting on grants grew from 10 to 15 hours per grant. Grantseekers overwhelmingly (72 percent) report that applications for small grants are rarely or never proportionate to funding. Funders' burdensome concern with risk has consequences. When each funder has its own grantmaking requirements and those requirements are multiplied by the number of grantmakers from which nonprofits must seek funding, the time and resources spent on grantseeking continues to grow exponentially.

Fewer than 50 percent of grantmakers report that they have strategic goals to improve practices. PEAK Grantmaking believes that without a collective, collaborative, and concerted effort to advance practices, philanthropy will continue to fall short of its potential.

How does philanthropy fully realize its potential?

Mobilize the expertise of grants management professionals to improve how grants get made.

When practices are viewed and valued as integral to strategy, better grantmaking happens. Grants management professionals can:

- ▲ Improve practices to link strategic, programmatic, and operational work.
- ▲ Inform approaches to close the power gap between grantseekers and grantmakers.
- ▲ Reduce and eliminate barriers to funding for marginalized communities.
- ▲ Promote lessons from years of grantmaking, across the organization.
- ▲ Generate innovative strategies for mitigating risk, while fostering true community engagement.

PEAK Grantmaking's unique audience and focus positions us to get the tools and resources needed to change philanthropy into the hands of staff at the intersection of decision-making and action.



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THE INITIATIVE

PEAK Grantmaking has created a set of **Principles for Peak Grantmaking** that enlists grants management professionals to achieve better programmatic and strategic outcomes for philanthropy by more directly linking the goals of funding organizations to the grant practices they employ to achieve those goals. The Principles **improve impact** through strengthening the way grantmakers operate and grounding this work in aspirational goals.

The Principles serve as benchmarks against which to test everyday activities. They bring to the forefront vital considerations that, despite the best intentions, can get lost in the daily push to develop an application, build a grantee portal, cut a grantee payment, or select a new grants management system. The Principles ground decisions and actions in an organization's values, mission, and goals.

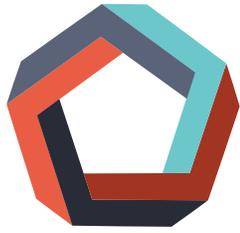
The Principles shift thinking to embed operations in all conversations about realizing goals and championing mission. Thinking operationally as well as programmatically is crucial for greater, more sustained success. How grants are made—just like what and who is funded—has ramifications for staff, grantees, grantseekers, partners, and the larger community.

The Principles offer a common language, similar lens, and collective approach that can be applied across an organization's varying departments and philanthropy's differing institutions. Teams throughout an organization and the field can use the Principles to get on the same page, resulting in deeper conversations in support of strategic and programmatic objectives.

The Principles are designed, in part, to generate greater information sharing and collaboration between programmatic and grant management teams and across disparate departments that all have a role in funding grants. Breaking down long-established silos in grantmaking can lead to greater gains for grantees, partners, and funders alike.

Funders, grantseekers, and grants management professionals consider the elements of these Principles critical to any effort to update and energize grantmaking, and many already have coalesced behind these concepts.





Principles for Peak Grantmaking

PEAK Grantmaking believes that a set of principles is needed to support grantmakers in their efforts to make practices a strategic imperative within their organizations. The Principles will help funders implement more effective, efficient, and equitable grantmaking practices. The result will be more principled and courageous grantmaking across philanthropy.

PEAK Grantmaking is issuing this call to action to grantmakers: Commit to the Principles for Peak Grantmaking and reach for the ideal, better-than-best practices that will transform philanthropy and society.

The Principles for Peak Grantmaking are:

Tie Practices to Values. Link grantmaking practices with grantmaker values, integrating them throughout every aspect of grantmaking to walk the talk and propel 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.

Learn, Share, Evolve. Contribute to building sector-wide knowledge and seek wisdom from others pursuing change and impact.

Steward Responsively. Manage all entrusted resources—human, financial, reputation, time—with care to balance stewardship with an agile approach to risk and an appreciation for different and changing circumstances.

Courage in Practice is Competency Driven

Successfully adopting the Principles for Peak Grantmaking will require grantmakers to employ experts in grantmaking practice to lead the change within their organizations. PEAK Grantmaking will support grants management professionals in developing that expertise through competency-based talent development programs and resources.

Our overarching paradigm is five Principles supported by numerous practices that are achieved through the demonstrated competencies of grants management professionals.

Principles—Practices—Competencies

- **Principles:** Aspirational goals for grantmakers.
- **Practices:** Proven ways to implement grantmaking policies and procedures in order to live these principles as a grantmaker.
- **Competencies:** Applied skills and abilities that enable a person or team to manage/maintain a practice, or a group of related things grants management professionals must perform to do a job.

Example:

- To fulfill the **Principle** of *Steward Responsively*, a team or person would **implement** the Practice of Optimizing Business Processes.
- To implement this **Practice**, a team or person would demonstrate the **Competency** of Process and Change Management.

Learn more about PEAK Grantmaking's Professional Competency Model (<https://www.peakgrantmaking.org/grantmaking-professional-competency-model/>)



Tie Practices to Values

Link grantmaking practices with grantmaker values, integrating them throughout every aspect of grantmaking to walk the talk and propel mission.

Grantmaking practices are often the lens through which grantseekers experience grantmakers' values. Practices that reflect an organization's aspirations, priorities, and point of view are a foundation for trusting relationships between grantseekers and grantmakers. Grantmaking practices and policies tied to values result in enhanced collaboration, shared learning, and better, more sustainable outcomes.

Board members and senior leaders at grantmaking organizations must make a commitment to their values and provide the space and flexibility for grantmaking staff to lead the way in aligning practices with values.

As the champions of grantmaking practice, grants management staff are well positioned to improve practices by tying them to the organization's values. Practices bound inextricably to values can lay the foundation for trusting relationships, met expectations, and true partnerships.

PEAK Grantmaking calls on funders to thoughtfully examine how their values are reflected in their practices and ensure consistency between what they say and what they do.



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.

Grantmaking achieves its broadest impact when true partnerships unite grantmakers and grantseekers in

service to the greater good. Based on trust and respect, these partnerships ascribe equal value to the experiences, resources, and needs of each partner.

Grantmakers that respect the grantee experience build trusting and respectful relationships founded on excellent customer service and two-way feedback. They rightsize the grantmaking process for the type, size, and/or previous relationships with grantees and implement flexible practices that consider that not all grantseekers bring the same resources to the process.

Board members and senior leaders at grantmaking organizations should commit to intentionally building power and capacity within nonprofit partners and to ceding space for solutions that come from grantseekers and grantees.

Grants management professionals are at the nexus of their organizations and those seeking grants. They can implement practices and policies that build trust, redefine the power balance, and narrow the power gap.

PEAK Grantmaking calls on grantmakers to adopt policies and practices that shift grantmaking to a more balanced partnership for social change and give up some of their power.



Drive Equity

Build grantmaking practices and policies that minimize bias and support decisions that promote justice, inclusion, and equity.

Funders sit at the intersection of power and privilege in the philanthropic sector. As such, they have a unique responsibility to drive grantmaking toward equity and inclusion.

Structural racism—and other “isms”—are rooted in policies and practices that advantage some people and disadvantage others. To drive equity, grantmaking practices must not mask bias with one-size-fits-all

requirements. Grantmakers should collect, analyze, and use disaggregated demographic data to inform their strategy. Grantmakers must find ways to enable small and emerging grantseekers to learn about, apply for, and qualify for funding.

Board members and senior leaders at grantmaking organizations should work to increase the diversity of grant decision-makers and strengthen the trust between donors and communities served.

Grants management professionals are uniquely positioned to ensure policies and practices do not broaden existing inequities, but rather strengthen support for marginalized communities.

PEAK Grantmaking calls on grantmakers to assess their policies and practices and adjust them, where needed, to minimize bias, reduce disparities, and be more inclusive.



Learn, Share, Evolve

Contribute to building sector-wide knowledge and seek wisdom from others pursuing change and impact.

Grantmakers increasingly are called on to learn, partner, collaborate, and amplify lessons across issues, fields, and sectors. Grantmaking practices must be designed to manage and share knowledge productively, in ways that inform grantmakers, grantees, and the social sector more broadly.

Grantmakers that are committed to continuous learning promote learning, clarify the purpose of reporting and evaluation, build reporting structures that support internal and external learning, and share what they learn to build the sector's body of knowledge. They learn from and alongside grantseekers, grantees, peer funders, and others. In sharing transparently, the data may affirm grantmakers' work or reveal challenges. Regardless, the knowledge will advance grantmaking strategies to the next level.

Board members and senior leaders at grantmaking organizations must use data and knowledge to push their grantmaking strategy to achieve greater impact.

Grants management professionals translate data into information and the knowledge needed to improve practices, strategies and impact.

PEAK Grantmaking calls on grantmakers to design practices that promote learning and share knowledge to contribute to the sector's impact.

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Steward Responsively

Manage all entrusted resources—human, financial, reputation, time—with care to balance stewardship with an agile approach to risk and an appreciation for different and changing circumstances.

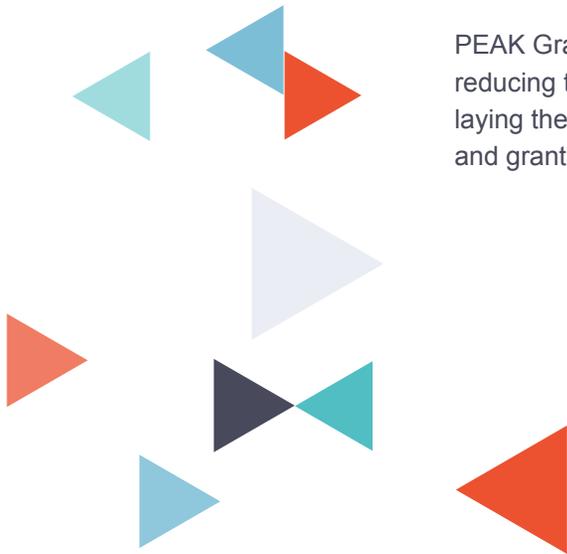
Responsible stewardship is a hallmark of effective grantmaking practices. Strong, sound, and transparent management of assets contributes to the public's confidence in philanthropy and increase grantmaking impact. Stewarding *responsively* adds a powerful new dimension to the work.

Responsive stewardship means identifying and managing risks rather than avoiding them. It means anticipating and adapting to all kinds and levels of change, especially in the rapidly shifting environment where grantees and grantseekers operate. It means sharing grantmaking information openly. It means using technology and data effectively and serving as facilitators of the grantmaking process rather than guards of the assets.

Board members and senior leaders at grantmaking organizations must have serious conversations about what it means to be responsive, take risks, and understand the context in which their grantees work.

Grants management professionals connect the dots across knowledge, systems, and relationships to assess and manage risk, seeking creative solutions to remove barriers to impact.

PEAK Grantmaking calls on funders to manage resources *responsively*, reducing the administrative and financial burdens of the grantmaking process, laying the foundation for trusting partnerships, and enabling both grantseekers and grantmakers to focus more fully on mission-driven activities.



THE OUTCOMES

The Principles integrate critical grantmaking roles—executive leadership, grant professionals, and program and other staff. Each brings valuable knowledge, experience, relationships, and ideas to the table. All are invested in advancing the institution's mission.

Funders that apply the Principles thoughtfully can realize **shared power, deeper trust, and broader support** among grantees, grantseekers, and the communities they serve. Systems and processes that are more equitable and more responsive can better advance the positive change funding institutions seek.

By fostering more direct engagement with grantees, grantseekers, and the communities they serve, the Principles can shine a **brighter spotlight on the ultimate audience** for the work of grantmakers and grants management—nonprofits and communities. Starting with the grantee in mind can suggest different approaches to grantmaking that inspire new levels of success.

Funders that adopt equitable grantmaking practices will be more successful in responding to the specific needs of communities, **narrowing gaps in opportunity, achievement, and resources**. Ultimately, they will have a greater impact on improving the living conditions for all people.

The Principles encourage funders to embrace more risk, while maintaining thoughtful standards for fiscal responsibility. Prudent risk-taking can allow for **more creative grantmaking**. With extra flexibility, grants management professionals can recommend new approaches that achieve bolder programmatic desires within boundaries established by government regulations and house rules.

The Principles can **promote greater collaboration within the operations side of grantmaking institutions**, enhancing the ability to tackle systemic issues and share proven practices. Closer relationships can be especially helpful for grant professionals working alone in their funding areas, organizations, or communities.

The Principles' common language, similar lens, and collective approach across philanthropy can create **new and unexpected connections** across organizations and among funders. As organizations move closer in step on operations, opportunities for greater partnerships can arise. Leveraging fresh connections can bring added resources to critical issues that no one organization can address alone.



COMMIT TO ACT

It is within the power of every grantmaker to prioritize practices, set strategic goals to improve them, and evaluate practices as critical indicators of success. The Principles for Peak Grantmaking have been created as that call to action for philanthropy to realize this potential.

Competent and courageous leadership is one of the most important variables in doing this work well.

We believe that competent and courageous leadership is one of the most important variables in doing this work well. PEAK Grantmaking supports and encourages grants management professionals to build their competencies and to be courageous in leading change in their organizations. Boards and senior leaders must show their courage by inviting and welcoming these efforts by their staff to bring greater thought and intentionality to their core work—the “how” of grantmaking.

PEAK Grantmaking invites grants management professionals and grantmakers to adopt the Principles for Peak Grantmaking in your work and to spread the word about your steps, progress, and results. Demonstrate your courage.

Create and support a team around the Principles to own the initiative in your organization. You can lead the way as a grantmaker or grants management professional—even if, as the latter, you are a team of one.

Develop a plan for how you/your organization will implement the Principles, improving your practices. Commit to a few steps the first year and build from there. Articulate your desired outcomes. Each organization’s plan will be different, reflecting the appropriate timing, order, and level of engagement for each funder and its grants management professionals and grantees.

Share your plan and your progress—the good, the challenging, and the interesting—for others to learn from. Post the plan and key updates on your website. We’ll link to it and help expand your audience. Update your plan with a new commitment (or more) annually.

Take advantage of PEAK Grantmaking education: webinars, chapter events, conference sessions, materials, blog posts, and other resources to build your expertise in the Principles and their related practices.

Engage with your colleagues and learn from them, through PEAK Grantmaking’s online member community portal. Share your plans and progress there in our community of practice.

Field-wide change may not happen quickly. However, working together—grants management professionals, grantmakers, grantees, grantseekers, partners, and philanthropy supporting organizations—we can power this movement to go further and faster. Let’s join forces and elevate the importance of practices across the field, aligning around these shared Principles for Peak Grantmaking.

METHODOLOGY

This work has been a collective effort, drawing upon and made more powerful by the diversity of our field. We have been in conversations with grants management professionals from all types of funding institutions. The Principles for Peak Grantmaking originate in lessons learned from years of grantmaking and gleaned from a multitude of grantees. For that reason, the Principles have resonated already with many in the field.

Throughout 2017 and 2018, PEAK Grantmaking was in the field, conducting conversations with members of our regional chapters, members from regional associations of grantmakers, and participants at several philanthropy conferences. We interviewed dozens of grantmakers about the opportunities and challenges that practice change can face.

We engaged volunteer working groups in deep and thoughtful conversation around each principle and the specific practice change that would be most impactful under each.

Our Board of Directors has been a committed, integral part of this work, guiding staff to push further and reach deeper.

We also compiled our past research, reviewed external research, and undertook new research.

We analyzed our findings from all of the above and concluded that applying the five, interrelated and overarching Principles for Peak Grantmaking to an organization's grantmaking practices can lead to more effective, equitable, and impactful outcomes.

We are identifying what these principles look like in action—what funders who live these principles do differently from their colleagues and how other funders can replicate those practices. Look for this additional work from PEAK Grantmaking to be released throughout 2019 and beyond.



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ABOUT PEAK GRANTMAKING

PEAK Grantmaking is a member-led national association of 3,600 professionals who specialize in grants management for funding organizations. The people of PEAK Grantmaking come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector.

This is where Practice Meets Purpose. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we support grantmaking practices designed to maximize the mission-driven efficiency and effectiveness of funders of every size.

PEAK Grantmaking's vision is of an equitable world, in which people have the resources and opportunities to thrive.

Our mission is to advance grantmaking so that grantmakers and grantseekers can best achieve their missions.

For more information, find us online at www.peakgrantmaking.org and [@peakgrantmaking](https://twitter.com/peakgrantmaking) on Twitter.



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