



Walking the Talk: Leading with Values

PEAK Grantmaking is a member-led national association of 3,500 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 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 at @peakgrantmaking on Twitter.

For more on Walking the Talk, visit www.peakgrantmaking.org/walkthetalk.

Identifying Institutional Values

Does your organization have a set of institutional values, either explicit or implicit?

Yes

No

Which of the following best describes how your organization engages with its values?

- My organization has an explicit and publicly shared (e.g., via website, annual report, application materials) statement of values or beliefs.
- My organization has an explicit statement of values or beliefs that is shared internally, but is not publicly available (e.g., via website, annual report, application materials).
- My organization does not have an explicit statement of values, but we operate with an implicit and internally understood set of values and beliefs.
- My organization does not have a statement of values and beliefs – explicit, implicit or otherwise.

What conversations, if any, are happening in your organization around values?

If your organization has values, what are they? Note them below, or select from PEAK Grantmaking's list of common grantmaker values on the next page.

Common Grantmaker Values

- **Collaboration, Partnership, Teamwork, Working Together:** Working together, both internally and with community partners, leads to better outcomes
- **Respect:** Holding the people with whom we work (grantees, partners, community members, staff members, board members, etc.) in high regard and treating them accordingly; generalized to a belief in the worth and dignity of all people
- **Integrity, Honesty, Ethical Behavior:** Telling the truth, holding ourselves accountable to highest ethical standards, both internally and when interacting with grantees and the community
- **Diversity, Equity, Inclusion:** Incorporating and including views and voices of staff, boards, and community members in all aspects of decision-making; rejecting bias, injustice, and other inequities that exist in the world
- **Accountability, Responsibility:** Holding ourselves (personally and organizationally) answerable to the mission, purpose, and results of actions taken, including but not limited to the expenditure of foundation resources
- **Transparency, Openness:** Making decision-making, operations, and processes visible
- **Innovation, Risk-Taking, Entrepreneurial Spirit, Creativity:** Finding new ways to look at problems, investing in ingenuity, supporting creativity to solve tough problems
- **Stewardship:** Striving to responsibly manage and care for financial and other resources entrusted to their use; being stewards of a donor/founder's vision and legacy
- **Learning, Continuous Improvement:** Seeking new knowledge and carefully evaluating and drawing insight from our own actions
- **Leadership:** Cultivating and celebrating effective leaders inside our own organization and in the communities served by the organization, accepting responsibility for and offering guidance on issues relevant to mission/role

If your organization does not have explicit or implicit values, why not? What if anything has prevented your organization from taking this step? How might you help move them toward this goal?

The Importance of “Walking the Talk”: Scenario for Discussion

Part 1: Applying to the Mysterious Foundation

Highline Change Project (HCP), a local 501(c)3 serving a small tri-county area facing significant demographic change, works to enhance community and civic empowerment by offering leadership and advocacy training for neighborhood residents. HCP has developed a new initiative to build connections among and between neighborhoods via its newly trained leaders. HCP is looking for funders to help launch this initiative.

HCP identifies Mysterious Foundation as a potential funder based on a newspaper article describing the foundation’s support of an organization similar to HCP, but located on the other side of the state. Their website offers minimal guidance, but does describe its grantmaking focus as “community development and neighborhood revitalization.” The Foundation’s stated values further encourage HCP:

- *We believe strong neighborhoods are the foundation of a strong society.*
- *We are welcoming, inclusive, and egalitarian.*
- *We seek to promote civic pride.*

HCP can find neither staff names nor direct contact information on the website. Trustees appear to make funding decisions and while the website lists them by name, it includes neither affiliations nor bios. Half the board members seem to be descendants of the foundation’s namesake while the other half are local business leaders and attorneys. HCP downloads grant guidelines (last updated in 2012) that seem to fit HCP’s initiative: grants up to \$25K, to 501(c)3 organizations (no fiscal sponsorship), projects that benefit HCP’s region. An upcoming open application deadline is around the corner, so HCP gets to work.

HCP completes the lengthy online application, collects the required documents (like it’s 501c3 designation letter, three years of audits, a board list with affiliations, etc), and spends time crafting a grant budget that matches the foundation’s financial categories. They spend a lot of time re-writing and reorganizing their program descriptions and outcomes to match the foundation’s stated objectives and application format. Altogether, they spend about 20 hours of staff time preparing the application. With baited breath, they hit “Submit,” sure that they have a good chance of winning grant dollars.

Then, they wait. Four months later, HCP receives a form letter that its request had been declined.

What, if anything, is wrong with this picture?

How to Align Practices with Values: Scenario for Discussion, Part 2

Part 2: Identifying Potential Improvements

You are a grants manager at the Mysterious Foundation. Over the holidays, you hear from your spouse's great aunt that her best friend's daughter and her employer Highline Change Project [HCP] had a frustrating experience with applying for a grant. It is impossible to glean all the details, second- and third-hand, from a relative who is unfamiliar with grantmaking and nonprofits. In fact, you rarely tell new acquaintances where you work because it often leads to awkward exchanges, such as: "How do I get some of that money?" and "It must be nice to give away money for a living!"

Even with an incomplete picture, however, you are pretty sure that HCP's frustration is justified. You remember seeing this application come into the office and knew its emphasis on individual leaders was not the strongest fit with the foundation's newly revised strategy emphasizing anchor institutions, parks, and other beautification projects. By the time you saw the application, it was, unfortunately, too late to save HCP the time they spent applying for the grant or the time you spent preparing the application for review.

Reflecting on the situation with HCP, you recall being at the board meeting when the trustees opted to keep staff and trustee contact information and more detailed information about the foundation's strategy off the website. Staff and trustees worried that the foundation's small staff would be inundated with phone calls and meeting requests. The trustees decided to roll out the new strategy slowly – "to get their feet under them" – before soliciting proposals or offering details regarding the kinds of projects they now hoped to support. "Let's just fly under the radar for a bit," the board chair had said.

The thing is, you understand the desire to fly under the radar – it's exactly why you rarely mention where you work! But, you also realize the Mysterious Foundation's practices could be much more effective and much less frustrating to applicants.

What changes would you recommend to the foundation's practices?

What if any of these practices could you as a grants manager work to change on your own?

How might you try to initiate a broader organizational conversation to make additional changes happen?