About PEAK Grantmaking...

A community of 3,600 grantmakers coming together... to improve how grants get made.
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 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.
Walking the Talk

Leading with Values
Learning Objectives

Learn about the critical importance of articulating organizational values and putting values into practice.

Understand how your organization is doing in aligning practices with values and learn how to enact positive changes within your areas of authority.

Discover skills and increase capacity to enlist colleagues and leadership in collaborative efforts to articulate and “live” organizational values.

Engage in discussions with your session colleagues about steps you can take to help your organization to “walk the talk”.

PEAK Grantmaking
Practice meets purpose
We Believe ...

Effective grantmakers have values and align those values with their practices.
Two Ways of Approaching Values

As a lever:
  - Advocate for changes to practices in a language that will resonate with leadership

As a lens:
  - Identify questionable practices, focusing on what matters most
Defining Our Terms

**Values** may be called ideals, intentions, commitments, or promises; values are the fundamental beliefs of an organization and should dictate how that organization, and people in that organization act.

**Practices** is everything that goes into how a grant gets made:
- Strategy & Policy
- Structure & Approach
- Requirements & Workflow
- Communication & Customer Service
- Knowledge & Information Management
Significant Findings: Values Alignment Matters

Organizational values and discussions on values are pervasive in the sector

Foundations are more effective when practices are aligned with values

- Yes
Finding: Alignment of values & practice increases effectiveness

More consistent and strategic decision making by board and staff
More effective/measurable outcomes
Better relationships with grantseekers
Better fit between applicants and our funding areas
More efficient application and reporting processes
Finding: Why alignment matters

It is important for grantmakers to align their values with their practices because...

Grant Seekers  Action  Partnerships  Build  Trust
Transparency  Impact  Grantees  Goals
Values  Mission  Organization  Clear  Message
Communities  Partners  Achieve

PEAK Grantmaking
Practice meets purpose
How are we doing?

<table>
<thead>
<tr>
<th>Practice Category</th>
<th>Average Self-ranking of Alignment of Values and Practice</th>
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<tbody>
<tr>
<td>Strategy and Policy</td>
<td>C</td>
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<tr>
<td>Approach &amp; Structure</td>
<td>C</td>
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<tr>
<td>Interface: Communication and Relationships</td>
<td>C-</td>
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<tr>
<td>Requirements, Process &amp; Workflow</td>
<td>C-</td>
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<tr>
<td>Knowledge/Information Management</td>
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Common Values Across the Sector

Collaboration, Partnership, Teamwork, Working Together
Respect
Integrity, Honesty, Ethical Behavior
Diversity, Equity, Inclusion
Accountability, Responsibility
Transparency, Openness
Risk-taking, Innovation, Entrepreneurial Spirit, Creativity
Stewardship
Learning, Continuous Improvement
Leadership
Diversity, Equity, and Inclusion

Would this value have shown up five years ago?

Where will it be five years from now?

What are examples of values-based practices focused on diversity, equity, and inclusion?
Walking the Talk Examples

**Bush Foundation**
- Value: “customer service”
- Practice: Simplified reporting requirements

**Weingart Foundation**
- Value: “communicating with transparency”
- Practice: annual community learning sessions with public results
Exploring Alignment

Scenario Part 1

- How are Mysterious Foundation’s values aligned with its practices? How does this support their work?

- Where do you see a disconnect between Mysterious Foundation’s values and practices? What are the consequences of the disconnect?
Your Alignment (DEI)

How well does your organization align its values and practices?

- Where are they aligned?
- Where can you do better?

What are the most important reasons you would give for why your organization should do better?
Scenario, continued

If you were the grants manager at Mysterious Foundation:

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

Mysterious Foundation Values:
We believe strong neighborhoods are the foundation of a strong society
We are welcoming, inclusive, and egalitarian.
We seek to promote civic pride.
Identifying Misalignment

Question how you are living your values

What does a transparent grantmaking process look like?
How can we embrace diversity in ways that go beyond asking applicants for organizational race/gender checklists?

And

Question how you address conflicting values

How can we balance our desire for specific outcomes while respecting grantees by not burdening them with very detailed report requirements?
Identifying Misaligned Practices

What is one grantmaking practice in your organization that could be better aligned with your organization’s values?
- **Name the value**
- **Describe the practice**

How would you change that practice to make it more aligned with your organization’s values?
- Specifically, what would be different in how you make your grants.
- Who would need to be engaged to make it happen?

Share and discuss
Advancing Alignment Across the Organization

What are barriers to advancing recommendations to change practices to better align them with values?
Challenges to Advancing Aligned Practices

- Lack of Time
- Disagreement on What to Do
- Different Priorities
- Leadership vacuum
- Mandate
- Management, hierarchy

- Resources/tech support
- Lack of collaboration
- Resistance to change
- Risk aversion
- Board conflict
- Different interpretations of values
- Others?
Tools for Building Consensus

When Alignment is Missing
Tools for Advancing Alignment

Engaging in Inquiry Before Advocacy

Building Coalitions for Change

Moving from Positions to Interests to Options

Having Courageous Conversations
Inquiry Before Advocacy

**INQUIRY**

**Cultivate your curiosity**
- The less you agree the more you need to understand
- Find respect for others even if you question their motives and conclusions
- Inquire into the impact of your actions on others

**Practice strategic listening**
- Quiet your internal voice
- Listen with heart and mind
- Listen to learn
- Test for their intentions

**Earn the right to inquire**
- Express and test your understanding
- Build on the aspects of their view that you share
- Be prepared to do what you ask of them

**ADVOCACY**

**Invite discussion**
- Use “testable” advocacy
- Share your perceptions of the “facts” and reasoning
- Test their understanding as you go

**Match responses to their concerns**
- Take their concerns seriously
- Give them the benefit of the doubt
- Seek and offer responses to their core concerns

**Seek trade offs**
- Use “AND”, not “but”
- Consider options that address your needs and theirs
Building Coalitions for Change
Stakeholder Mapping

Goal: Share information on website

- Potential challenger
- Key ally
- Long-term board members
- New board members & ED
- Other staff
- Grants manager
- Current web developer
- Local grantees
- Program recipients
- Potential ally (can we mobilize?)
- Marginal Player

PEAK Grantmaking
Practice meets purpose
Moving from Positions to Interests to Options
Move from Positions to Interests

**Position** = What I demand or say I want

**Interest** = Why I want what I want

Before meeting, analyze your interests, and theirs.

While together, explain your interests

- Key Questions: ‘Why is that important to you?’
- ‘Of all the things we’ve discussed, which is most important to you?’
Grantee: “3-Year Grants”
- Predictable cash flow
- Reduced application burden
- Invest in long-term projects
- More money

Board: “1-Year Grants”
- Keep grantees accountable
- Mitigate financial risk
- Inertia/precedent
- Minimize commitment

Positions to Interests

Predictable cash flow
Reduced application burden
Invest in long-term projects
More money

Keep grantees accountable
Mitigate financial risk
Inertia/precedent
Minimize commitment

PEAK Grantmaking
Practice meets purpose
Brainstorm to Generate Options

- Contingent on grantee performance
- Contingent on foundation resources
- Minimize reporting requirements

- Longer term grants for basic funding only

Reduce grantee burden while minimizing foundation financial risk
Having Courageous Conversations

Perceptions ("Facts")

Emotions

Values and Beliefs

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Practice meets purpose
Polarized Perceptions

Overbearing Forest Residents Terrorize Lost Girl, Force Her to Abandon Temporary Shelter

Juvenile Delinquent Breaks Into Absent Family’s Home, Steals Food, Wantonly Destroys Furniture
Advice for Courageous Conversations

Perceptions (“Facts”)
- Cultivate curiosity about their point of view
- Balance advocacy with plenty of inquiry

Emotions
- Pause and acknowledge emotions
- Attend to the feelings beneath the words

Values and Identities
- Acknowledge their values
- Explain your values and try to identify common values
Tactics to Overcome Opposition

Pilot
- Make change for one program or defined period of time

Contingent Commitments
- Example: “If the endowment shrinks by >5% in any given year, we will limit new 3-year grants until the endowment recovers.”

Don’t Give Up

Ask Forgiveness (if needed) Over Permission
Levers to Influence Change

Values
Human Face
Cost
Benchmarking

Change

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Practice meets purpose
Personal Action Plan

What action steps will you take to align values and practices in your organization?

Write down at least one commitment you are willing to make.

Share it with the person next to you.
Additional Resources

[Logo for PEAK Grantmaking]
www.peakgrantmaking.org/walkthetalk

[Logo for Consensus Building Institute]
www.cbuilding.org

[Logo for Justice Funders]
justicefunderson.org/Choir-Book

[Logo for William & Flora Hewlett Foundation]
www.hewlett.org/about-us/values-and-policies/

[Logo for GE Funders]
geofunders.org/what-we-care-about/culture