



PEAK Grantmaking

Practice meets purpose



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.





KNOWLEDGE CENTER



ONLINE COURSES



June 2017

connect

practice
development
inspiration
COACHING
mentoring
knowledge
motivation



LEARNING ADVISOR



ONLINE COURSES

PEAK Insight Journal

Successful Structures
Rethinking the Role of Grants Management

Effective grantmaking organizations...
...redefine the role of grants management...
...common characteristics of successful structures...

Project Streamline

GM101

Grants management training for those new to the field who want to accelerate their grantmaking knowledge. Presented by the leader in grantmaking practice.

Chapters



DATA BOOTCAMP

annual conference

Walking the Talk

Leading with Values



Presenter

Melissa Sines

Effective Practices

PEAK Grantmaking

@nonprofitdork



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”

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.

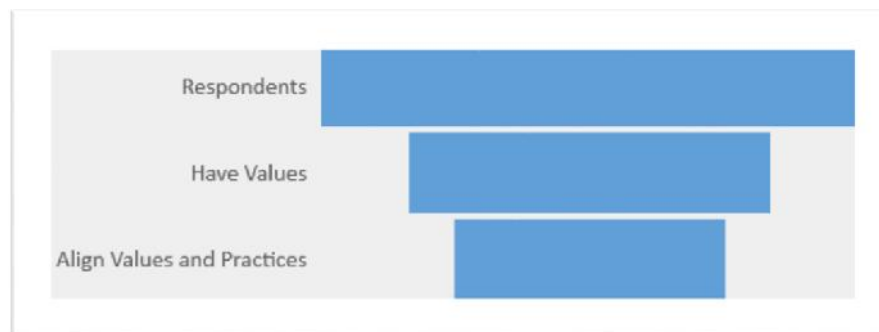
Practices is everything that goes into how a grant gets made:

- Strategy & Policy
- Structure & Approach
- Requirements & Workflow
- Communication & Customer Service
- Knowledge & Information Management

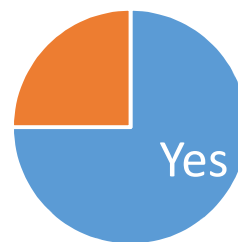
Significant Findings: Values Alignment Matters



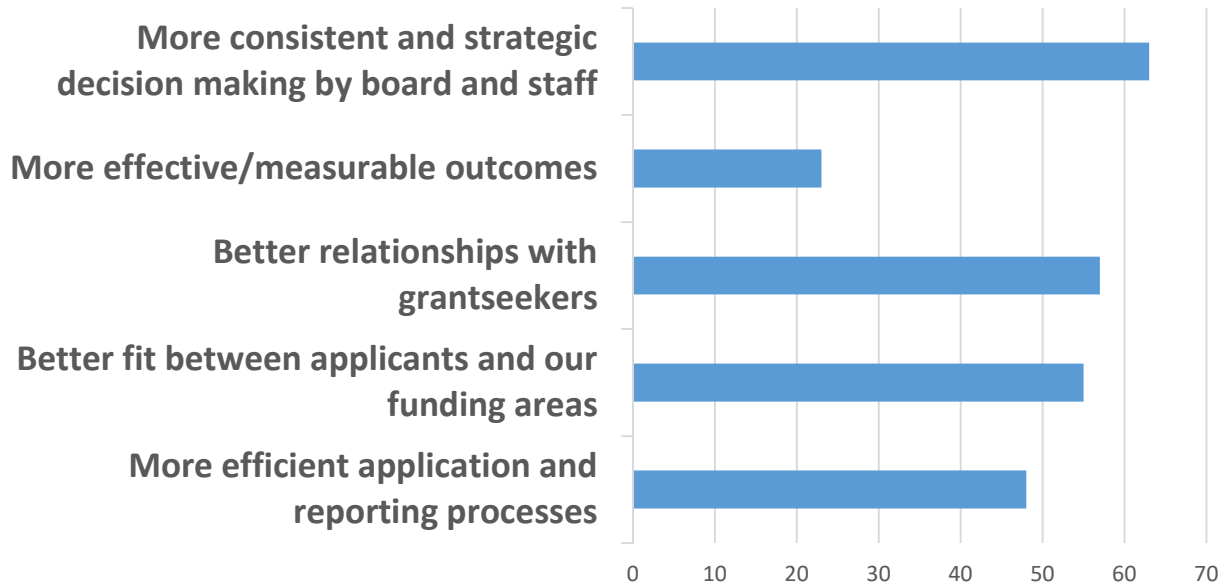
Organizational values and discussions on values are pervasive in the sector



Foundations are more effective when practices are aligned with values



Finding: Alignment of values & practice increases effectiveness



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



How are we doing?



Practice Category	Average Self-ranking of Alignment of Values and Practice
Strategy and Policy	C
Approach & Structure	C
Interface: Communication and Relationships	C-
Requirements, Process & Workflow	C-
Knowledge/Information Management	D

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?

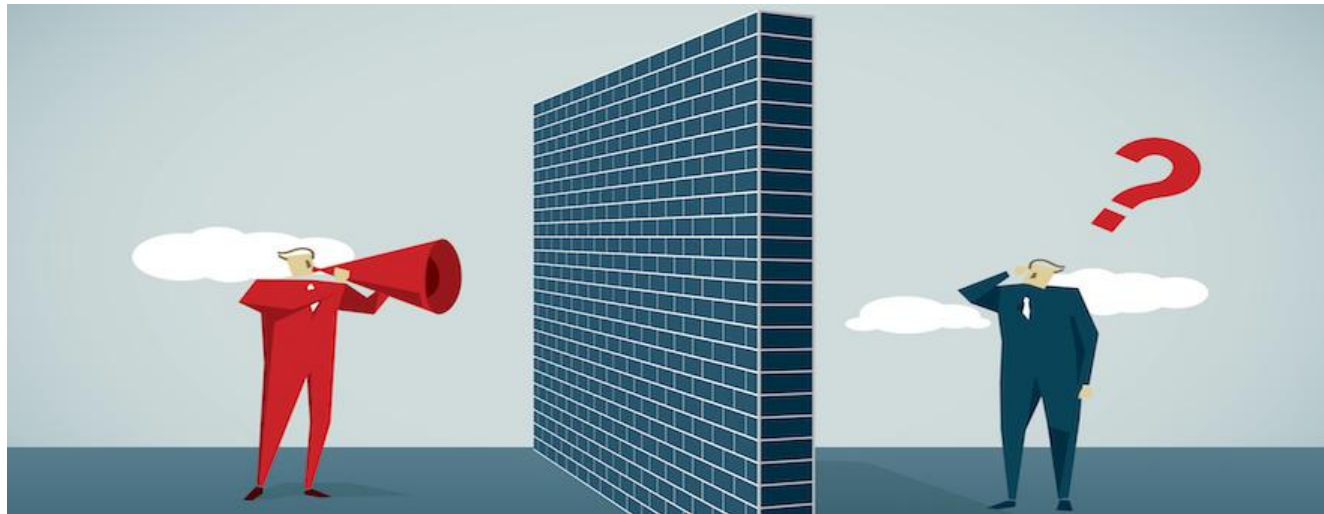
- Specifically, what would be different in how you make your grants.
- Who would need to be engaged to make it happen?

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

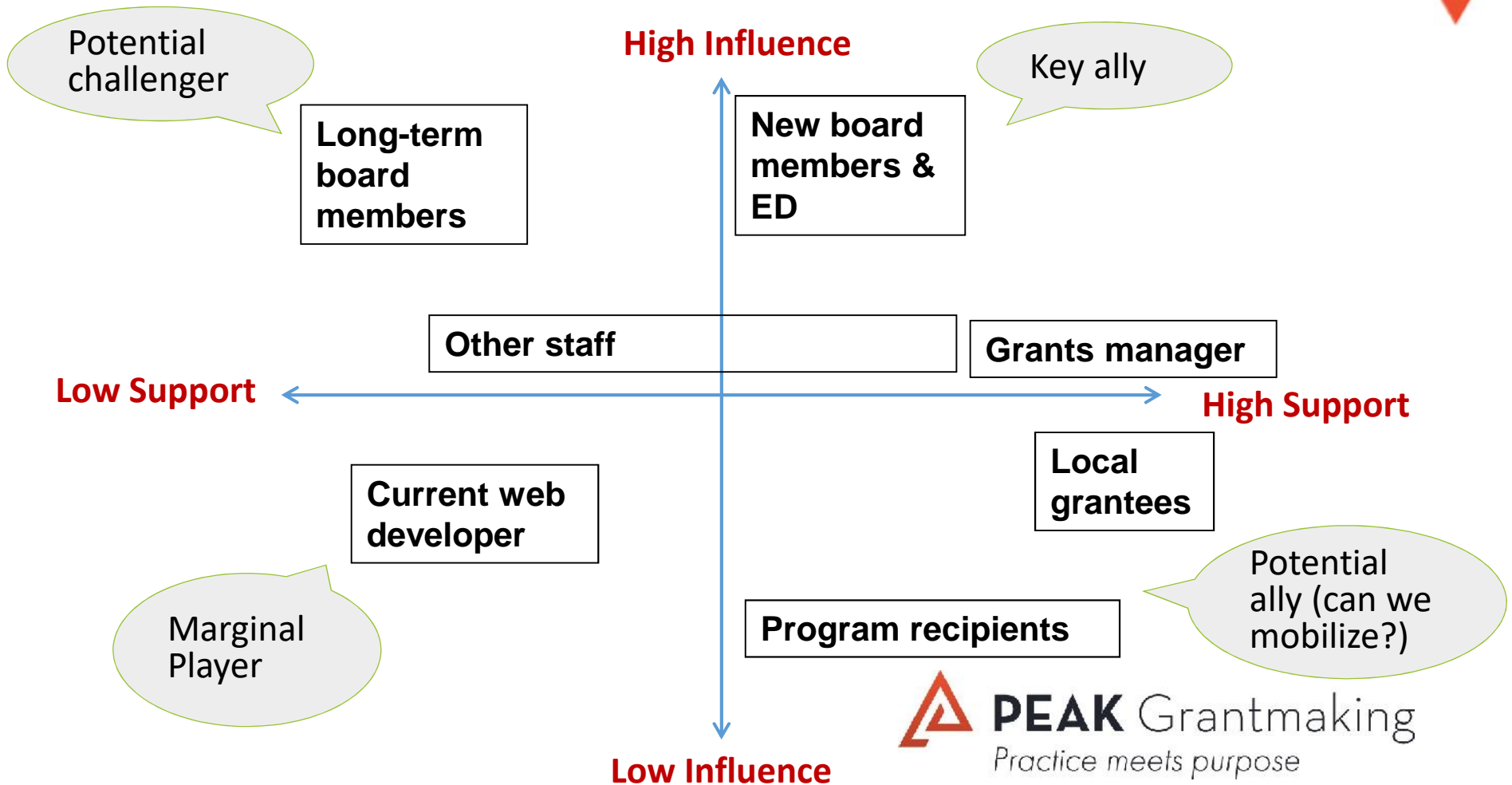
- Use “AND”, not “but”
- Consider options that address your needs and theirs

Building Coalitions for Change



Stakeholder Mapping

Goal: Share information on website





Moving from Positions to Interests to Options



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Move from Positions to Interests



Position = What I demand or say I want

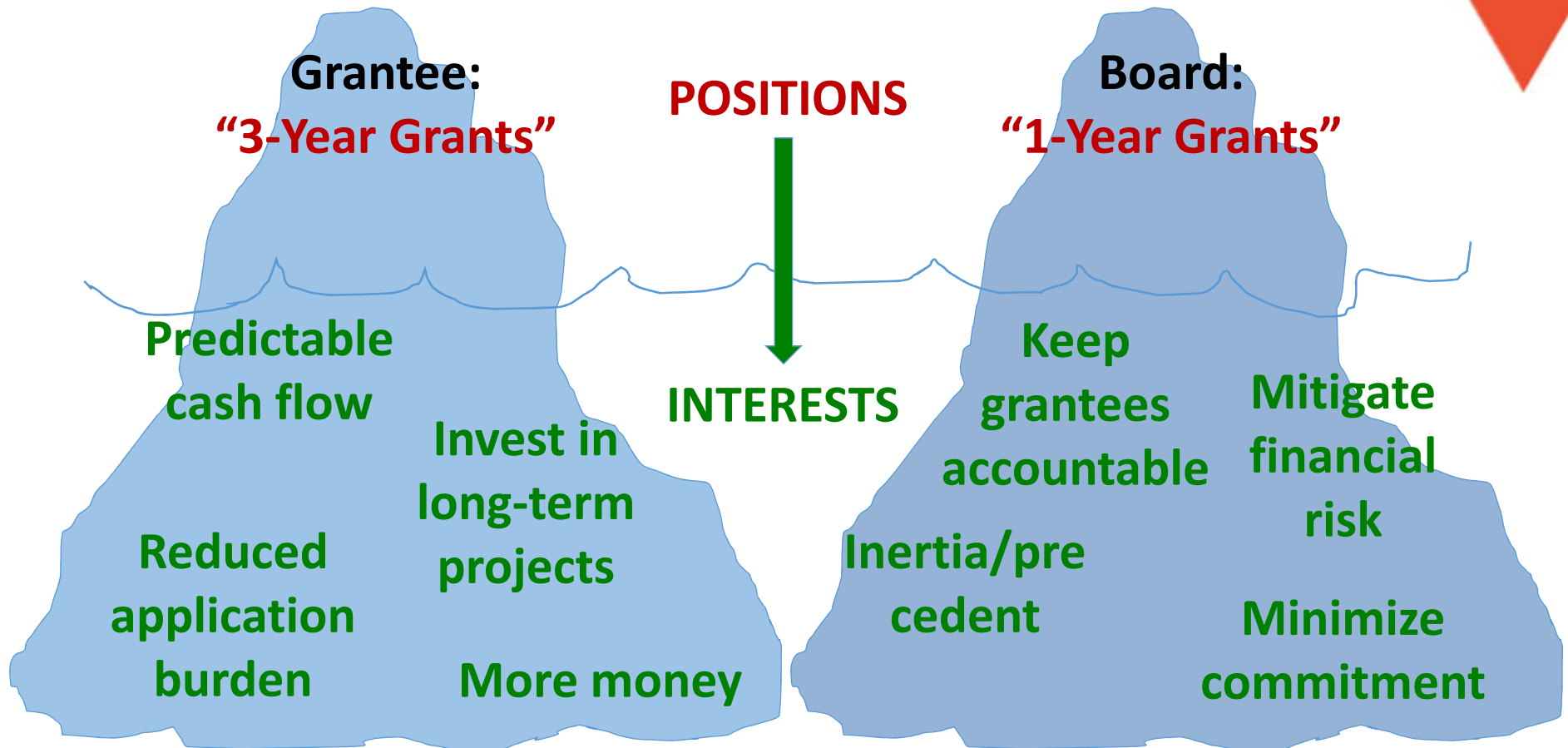
Interest = *Why* I want what I want

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?'*

Positions to Interests



Brainstorm to Generate Options



Contingent on
grantee
performance

Contingent on
foundation
resources

Minimize
reporting
requirements

????

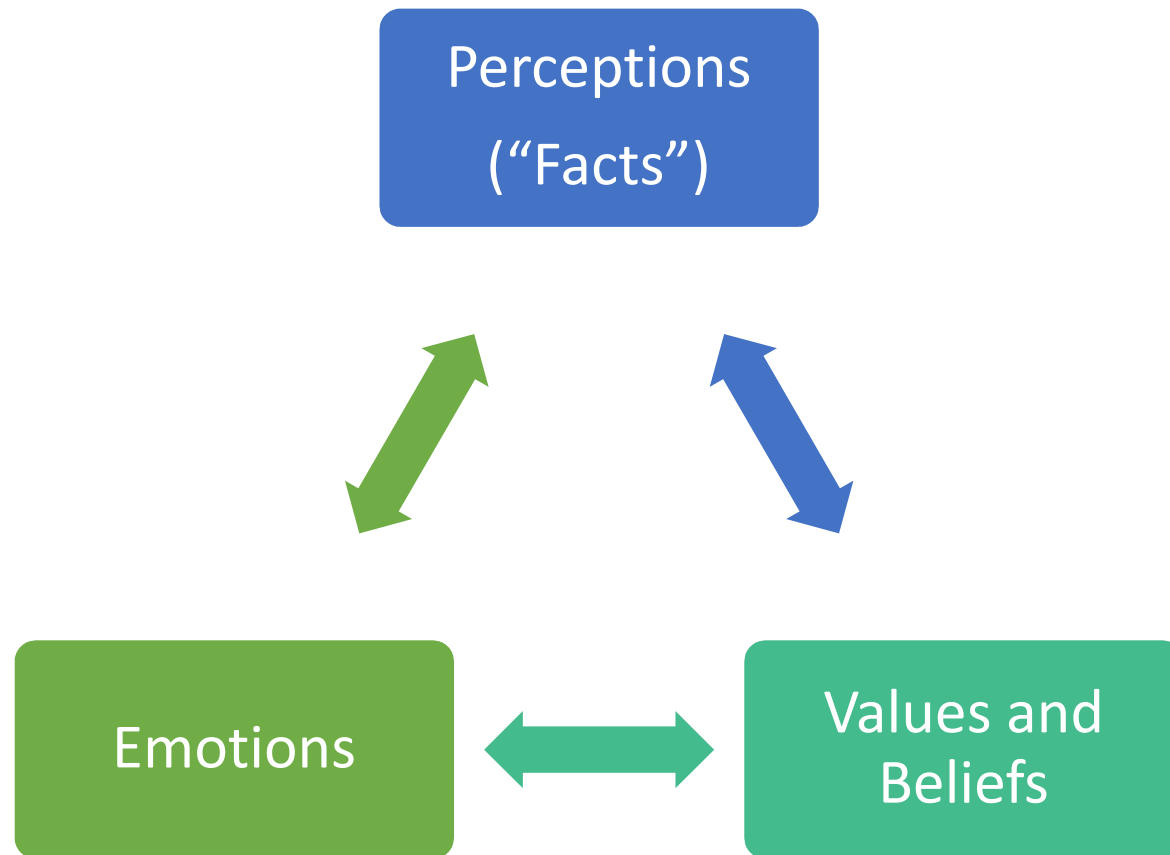
Longer term
grants for
basic
funding only

**Reduce grantee burden while
minimizing foundation financial risk**



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Having Courageous Conversations



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

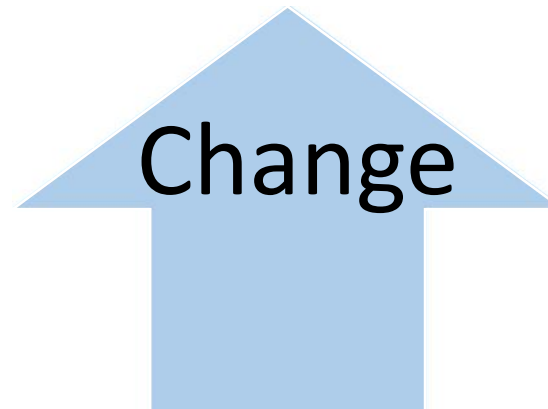
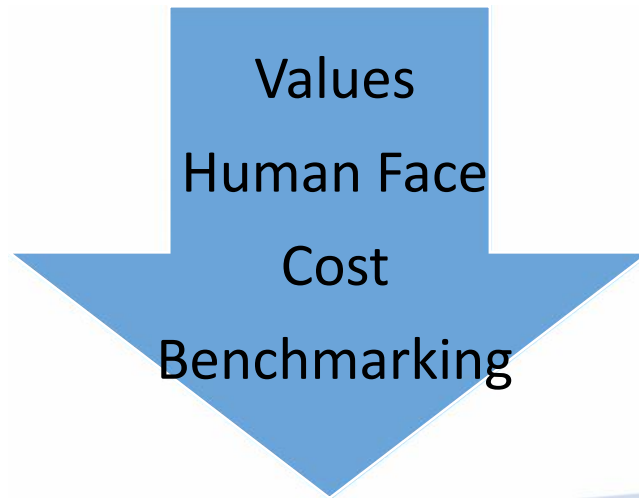
Contingent Commitments

- 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



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.

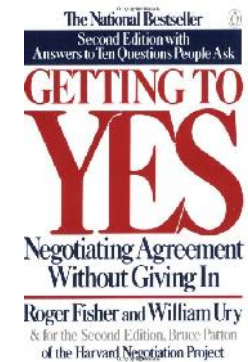
Additional Resources



www.peakgrantmaking.org/walkthetalk



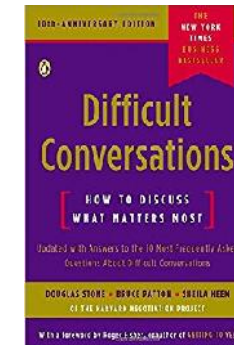
www.cbbuilding.org



justicefunders.org/Choir-Book



geofunders.org/what-we-care-about/culture



www.hewlett.org/about-us/values-and-policies/



