



UNITED PHILANTHROPY
FORUM

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**PUSHING TOWARD EQUITY
IN PHILANTHROPY:
The Case Story of
PEAK Grantmaking**

**Prepared by Community
Centered Evaluation and
Research**

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Acknowledgements

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Community Centered Evaluation and Research (CCER) was founded in 2018 out of a desire to center racial and economic equity in research and evaluation. Community CER is a values-driven, woman-of-color-owned social change research and evaluation consulting firm dedicated to supporting social sector organizations to achieve their greatest impact.

ABOUT THE CASE STORIES AND THEIR CONTRIBUTORS

Advancing racial equity, diversity, and inclusion (REDI) in philanthropy is a key strategic priority for the United Philanthropy Forum (Forum). Over the last few years, Forum has embedded racial equity intentionally and explicitly, both internally with the organization and externally through programming and resources to PSO members. Among the resources provided to member PSOs is the Forum's Racial Equity Organizational Self-Assessment, originally launched in 2019. The findings from the 2019 assessment helped Forum better understand how to support members along their racial equity journey, as well as provided great insights for members about their own racial equity journey and that of the sector.

To complement the learnings from the Racial Equity Organizational Self-Assessment, the Forum commissioned Community Centered Evaluation and Research (CCER) to uplift and share PSO member's racial equity learning journeys through the development of in-depth case stories. The case stories capture the wide experiences of PSOs across varying geographic regions and organizational size and breadth of focus. Four Forum PSO member organizations shared and reflected on their internal and external racial equity journey through one-on-one, in-depth interviews conducted with various staff members. The PSO member organizations that participated in the case stories are listed below, along with the key staff that contributed their time and perspectives.

ABOUT THE FORUM

As the largest and most diverse network in American philanthropy, United Philanthropy Forum holds a unique position in the social sector to help increase philanthropy's impact in communities across the country. We are a membership network of nearly 100 regional and national philanthropy-serving organizations (PSOs), representing more than 7,000 funders, who work to make philanthropy better. The Forum envisions a courageous philanthropic sector that catalyzes a just and equitable society where all can participate and prosper.

The Forum has created a new kind of philanthropic network that brings together regional PSOs' deep regional roots and connections with national PSOs' deep content knowledge and reach. Given our network's scale and scope, we can lead change and increase impact in philanthropy in a deeper and broader way than any other organization in our field.

To learn more about Forum membership, please visit: www.unitedphilforum.org/join.

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About This Case Story

PEAK Grantmaking's racial equity journey is a story of balancing broad efforts to advance equity across philanthropy with an internal equity journey. Interviews with seven insiders (leaders, staff, and board members) at PEAK shed light on how the organization is evolving, grappling with tensions, and seeking to live its values.

PEAK Grantmaking, a nationwide member organization of philanthropy professionals working toward more equitable, effective grantmaking practices, was founded in 1996 as the Grants Managers Network, changing its name to PEAK Grantmaking in 2017.¹ Today, PEAK's network includes over 7,000 individuals and over 500 member organizations. Focusing on equity is not a new concept for PEAK. A board member offered a brief history:

“The idea of equity really dates all the way back to PEAK’s founding. PEAK exists because of a spirit of wanting to create equity in philanthropy for grants managers. Prior to PEAK’s work, grants managers, many of whom are women, Black or brown, were thought of as back-office support staff. PEAK has really evolved the field’s understanding of grants management staff as professionals who can help a foundation advance and inform strategy with knowledge-driven decisions.”

At the same time, an explicit centering of equity and racial equity throughout PEAK's work and organizational culture developed more recently. A notable milestone was the 2019 launch of five Principles for Peak Grantmaking (see inset). The Principles articulated PEAK's equity-infused approach to its work, taking a risk that some members would be put off by this stance. As an insider described it,

“PEAK, like many other philanthropy-serving organizations, had a tendency to go with the tide. You didn’t want to disrupt. You didn’t want to piss off. You didn’t want to lose a member. With the Principles, we put a stake in the ground. Equity was where we were going. There are ways of showing up in the world where you’re not making anything fairer or better. We as individuals and as a board were going to have to get much more centered on racial equity and justice.”

¹ For more information on PEAK Grantmaking, visit www.peakgrantmaking.org.

Principles for Peak Grantmaking^a

Tie practices to values. Link grantmaking practices with grantmaker values, integrating values throughout every aspect of grantmaking to propel the 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.

Steward responsibly. Manage all entrusted resources—people, finances, reputation, time—with care to balance stewardship with an agile approach to risk.

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

^a From www.peakgrantmaking.org/principles-for-peak-grantmaking/

THE JOURNEY: BECOMING MORE EXPLICIT ABOUT RACIAL EQUITY

Stepping back, how did PEAK arrive at a place where it was communicating its racial equity position and advocating for racial equity across the field? “It wasn’t like there was a moment we did this big shift to be about racial equity,” noted one insider. An early step, a staff member recalled, was adjusting the organization’s mission and vision to reflect evolving values. “I believe we revised the mission and vision in 2015 to move us in that direction,” the staff member said. “As the organization advances, it’s time to revisit the language that we use and be vocal about the organization’s values.” Around the same time, another noted, “We did start talking about how we wanted to incorporate diversity and equity in our organization. We wanted to lead in DEI in our sector and set an example. We realized this was [an effort] that would serve our members.” There was also a sense that the staff felt ready to take on diversity, equity, and inclusion: “We all in varying degrees welcomed the conversations.”

Once the organization was more clearly oriented around DEI and values-based work, several key actions advanced PEAK’s ability to center racial equity:

- **Making a financial commitment to racial equity work.** Integrating an equity focus into internal and external operations requires reflection, learning, planning and implementation—in other words, staff time and resources. Because, as one PEAK insider remarked, “a desire was there, but sometimes the bandwidth wasn’t,” the board realized the need “to intentionally prioritize it and resource it.” Another person commented that PEAK began “deliberate fundraising efforts [to secure] general operating support and use it for these projects,” noting that this required sometimes explicitly pushing back on funders’ “assumption that we should only be doing for the members and not really supporting our own professional development or competencies.”

“It’s the board’s role to elevate things like [equity] and say, ‘We’ll find the money for this. Let’s not make it contingent on grants.’”

-PEAK staff

- **Developing the Five Principles.** The process of crafting the five Principles for Peak Grantmaking (above) offered a chance for the staff and board to think deeply about articulating standards for the field of grantmaking, with equity taking a central role. As one insider put it, the process was “an opportunity to think more intentionally about what PEAK means by racial equity when we tell our members to advance equity.” Another added, “Only one of the five Principles says ‘equity’, but every one of those is about equity. Being responsive and the way you steward learning, sharing, and evolving together—it’s all about equity.” PEAK staff strove to package the Principles in a way that “would be accessible and readable. We really needed to position the Principles as the roadmap for the sector.”
- **Embracing bold leadership mixed with humility.** In 2020, PEAK brought on Satonya Fair, a Black member of the board, as its first president and CEO. One colleague described the leadership change:

“The Principles work started when Satonya was on the board, but really picked up steam under her leadership. We very much prioritized racial equity in the [CEO] job description and with the search firm that we hired. That’s a really important piece of operationalizing equity. It’s all about having the right leadership in place and having commitment from leadership to this work.”

While another colleague portrayed Satonya’s reputation as being “a person who is a dynamo, speaking up boldly,” they also underscored “a lot of humility” that she brings to PEAK’s organizational culture. Staff reported that Satonya’s openness to learning and expectation of missteps along the way encouraged them to embrace the journey.

Effective leadership and collaboration around the five Principles laid a foundation for PEAK to center equity in practice. “The primary thing that runs through everything we do at PEAK is equity,” one staff member commented. Another added, “It is explicit and implicit, from our hiring to how we look at events, to our members and supporting them in their efforts to be inclusive in their grantmaking. It has been quite a change. As a staff we support each other and are at different places in our learning.”

“The story of equity is embedded in everything we do.”

-PEAK staff

EXTERNAL APPROACH

To supportively advance equity across philanthropic practice, PEAK first wanted to gauge needs and opportunities among its members. “We started with asking questions and listening to member stories to think about what role we could play,” explained one PEAK insider. Another agreed, “We have a very deep commitment to community listening. The learning piece is critical for assessing where the community sits, what their interests are, what they’re going to be most receptive to benchmarking.” PEAK also used the conversations to introduce members to their ideas about centering equity. “Something that PEAK has really focused on,” a board member remarked, “has been to meet people where they’re at and try to push people outside their comfort zone but also be respectful and really get them to join this DEI journey.”

PEAK discovered that member demand for support with equity work outweighed resistance. As a staff member explained it, “Externally, being very vocal about our Principles and calling out white supremacist culture, we have lost members. We have had members say that’s not the journey they want to be on. That being said, we’ve had way more members join. They are looking for resources and opportunities to practice those skills.”

“There’s overwhelming interest [among members]. We see that in the uptake and participation and feedback.”

-PEAK staff

The organization has centered racial equity in its external programming in several arenas:

Leading challenging conversations about philanthropy’s role. Confronting uncomfortable truths about philanthropy’s role and how its systems and operations can perpetuate inequities can be a hurdle for organizations hoping to chart a more equitable path. Recognizing that each grantmaking organization and individual is at different places on their equity journey, PEAK has stepped into a role of opening challenging conversations that acknowledge where people are and support their exploration of more uncomfortable concepts. “Not all members are necessarily at the same point in their DEI journey and some might still be very uncomfortable with the concept and the terminology,” commented a PEAK insider. “So, that requires some craft—meeting people where they’re at but also understanding that this is our end goal.” PEAK leadership and staff bring strategy and experience to the conversations. As one described it, “I’ve learned over the years how to talk about really uncomfortable things with people and not make them run for the door. You are going up against what people have thought and done for years, whether it be around systems or around race, and you’re changing that. You cannot make them feel bad. What you have to do is talk about facts.”

Working with foundation leadership as well as grantmaking staff, PEAK sees opportunities to shift thinking at multiple levels of philanthropic organizations. A board member remarked, “PEAK has been really good at getting the message out to senior leadership and to C-suite [executives] about why this work matters, but also at working with new grants managers and staff who are early in their career so they can bring those concepts back to their organizations.” In addition to working directly with members, PEAK publishes articles making a case for DEI in philanthropy.^{2,3} For more on how PEAK encourages equity conversations from the bottom up, see the sidebar.

“For a long time, funders took a lot of uncomfortable concepts for granted. Why does philanthropy even exist? Why do we have these mass fortunes that then get redistributed to communities who don’t have a say and why is it that people of color aren’t involved in those decision-making processes?”

-PEAK staff

Giving funders tools to take action. Along with leading organizations in advancing their thinking about racial equity, PEAK provides resources and assistance with implementing equity-centered practices. Indeed, PEAK aims to “stand out from other philanthropy-serving organizations (PSOs) by leading the conversation around how to operationalize equity. Giving members tangible resources is at the center of what PEAK does,” said one leader. A few of the numerous examples of such resources include:

- Webinars on implementing equity-centered practices;
- Peer groups focused on equity;
- Toolkits, such as a collection of planning- and how-to guides entitled “Driving Equity with Demographic Data Collection”; and
- Annual Conference sessions on taking action to drive equity.

A staff member highlighted another example that stands out from several years ago:

“The goal of Project Streamline [at PEAK] was to get grantmakers to share information and consolidate their grant application processes... Streamlining the application process takes the burden off the grantee so they have more time to do the work and less time asking for funding. That really helped elevate the equity piece. [It addressed the question,] ‘How can we lessen the burden and still collect information and make sure that we’re giving funding in an equitable manner and serving the communities that we actually seek to serve?’”

² For example, Fair S. 2022. Take it from the nonprofits: Even in a crisis, funders are falling short on equity. The Center for Effective Philanthropy. cep.org/take-it-from-the-nonprofits/

³ More resources linked at www.peakgrantmaking.org/insights/?news_topic=diversity-equity-inclusion.

Helping Grantmaking Staff Champion Equity

PEAK often interacts most directly with grantmaking staff who hold little decision-making power at their organizations. PEAK argues that helping these staff recognize equity issues and giving them tools to take steps within their workplaces holds promise. “Staff of some of these organizations who have never heard these concepts attend the conference and feel uncomfortable and challenged,” observed a PEAK insider. “They may or may not bring those concepts back to their organizations and apply them, but there’s a slow transformation happening. They begin to gradually permeate the cultures of their own organization.”

Indeed, one of PEAK’s strategic goals is to support grants management professionals in becoming change agents for equitable practices. “We’re helping people learn to have these very tricky conversations and hold their own in an organization where they may be saying the only thing around equity or racial equity. And to know that PEAK is supporting them from afar,” a leader explained. “Our work is about advocating for that individual who believes that racial equity is important and is willing to raise their hand at their organization and say, ‘I volunteer to help us here or to form the first employee group.’”

PEAK also collects data and makes findings available to its members, including the results of periodic demographic surveys of members. Offering another example of data sharing, a staff member said:

“We did a salary survey a couple years ago which underscores women getting paid less even in philanthropy—and people of color and women who are people of color—those issues are all there. But [it’s] about us publishing that and then hearing from members who it really influenced and then sharing that back with community where they were able to go in and say to their leadership, ‘Here’s information about what’s going on. Here’s what’s fair.’”

Sharing Black voices and member insights. In addition to providing resources, PEAK serves as a platform to share members’ work and insights on equity and highlight the experiences of Black people in philanthropy. In 2020, PEAK published the first edition of its member magazine, PEAK Grantmaking Journal, called “Black Voices in Grants Management.” As a PEAK staff member reported, “Three years later, it is still one of our top-accessed resources, which tells you a lot. It’s a very shocking, powerful issue where we got a lot of very brave folks to speak up about their experiences in philanthropy. And it’s continued to reverberate.” Staff also noted that PEAK uses its website to lift community voices, amplifying the thought leadership of members, partners, and allies through weekly publication of insights.

“We heard so many people say during the pandemic, ‘We felt included in a way that we never felt included.’”

-PEAK staff

Although PEAK has received much anecdotal feedback that their equity work is effective and valued, measuring progress in a meaningful way has posed a challenge. A leader described “moving away from bean counting and more towards measuring goals against specific indicators.” A board member concurred that the board has been “thinking about what assessment means,” particularly in the context of its equity-related goals, including looking at “collaborative goal-setting methodology used to describe goals with measurable results,” but that it will “be a continued conversation at the board and staff levels in coming months.”

A related frustration has been that many of PEAK’s funders expect the organization to tie each financial contribution to specific achievements, including moving the needle on equity-related issues. An insider noted that PEAK has “individual funders wanting to track how their individual grant is contributing to progress,” yet their “investment was nowhere near the level” that would make a traceable difference in such a large effort. The speaker went on,

“It takes a lot for systems to reform and change. You may have made a multi-year, multi-million dollar investment, but the problem was a billion dollar problem. Even coming in with a high investment doesn’t mean that what you contribute can be tracked against this linear line of progress. Funder after funder after funder and member after member after member who sometimes write us a \$5,000 check are somehow thinking that what they invested is leading to this huge transformation. What I would say is everybody investing in PEAK is helping us transform, but it’s not one individual funder.”

INTERNAL APPROACH

As PEAK Grantmaking sought to support its members on their equity journeys, staff saw the need to work internally as well, but the organization's readiness and capacity lagged somewhat. Multiple PEAK insiders voiced a strong rationale for taking on racial equity internally, stating, for instance, "We at PEAK could not be going out talking about our Principles without first applying them internally with staff." But as another insider explained, "Like a lot of organizations, PEAK was really good at getting its members on board with DEI but was less prepared to jump in on its own internal practices and examine its own biases, hiring practices, and relationships, and what it really looks like to have a culture of DEI." Overall, there was a sense that, as a staff member put it, "Internally we need to catch up to our external work as a team."

Nevertheless, although many insiders described PEAK as still being early in its internal equity work, they portrayed a range of efforts and changes happening within the organization since late 2020.

Strengthening equity among staff and board through hiring, reflection, and coaching.

Building a staff and board committed to racial equity is central to advancing equity both internally and externally. PEAK insiders spoke of diversifying staff and board, facilitating reflection, and providing coaching.

Staff and board diversity. PEAK routinely collects demographic data from its staff and board, and in part because of examining its internal demographics, has adjusted its hiring practices and job descriptions. Additionally, outreach now reflects PEAK's desire to attract and retain women and people of color as well as people whose values align with PEAK's, including a commitment to racial equity. "We are deliberate about engaging with firms owned by women and people of color. We have made an effort to push out job announcements to places where people of color might look," noted a staff member. Another explained, "We are thinking about who is part of the staff and what kind of competencies they bring to the table around DEI and racial equity."

PEAK has prioritized diversity on the board as well. An insider shared that after PEAK developed its five Principles, "We made a conscious effort to diversify the board pipeline because we know it's important to look at which voices are represented and which are missing. Grants managers are very diverse, so it's important that we reflect diversity of lived experiences on the board." Moreover, the same person continued, "There was definitely the desire on our board to want to walk the talk."

Diversification efforts have paid off. Prior to 2020 the organization was primarily white; now, a staff person said, "We have a very racially diverse staff and board, which has been remarkable."

“We put ourselves out there with the five Principles and have heard from [job] candidates that they admire the organization and the explicitness of our commitment to equity.”

-PEAK staff

Reflection. Approaching uncomfortable conversations with staff proved difficult at first. One staff member noted that early in the internal reflection process, in which a small group of staff led discussions,

“It was rocky for some. We had some staff who had never been in these conversations and others who had been discussing [equity] for years. Trust is essential; I don’t know that everyone felt the trust at the beginning. Some of our efforts with conversations floundered internally because we didn’t know how to manage people being in different places. Some people couldn’t prioritize conversations, some felt that we were not moving fast enough. We receded back into individual learning and one-on-one conversations as opposed to having the whole group together because we didn’t have the expertise to help us facilitate.”

Working through bumps in the road, some staff reported that they felt encouraged to do their own learning, with acknowledgment from leadership that each person was on their own journey. PEAK’s external work also served as a prompt and opportunity to reflect on internal practices. An insider, echoing others, related, “When we were talking about the Principles and racial equity, we would say, ‘Wait, are we talking about the policies and practices for our members or [for] our own organization internally?’ We felt like you have to hold up the mirror to yourself as an organization and be okay with that being uncomfortable.” Another commented, “Sometimes we have to be the biggest consumers of our own information. When we do these online conferences, we’re getting feedback in real time about what is moving people. We’re all taking that in and making some progress in our understanding of equity and our ability to articulate the challenges. I have changed a lot through listening to our members.”

Coaching. PEAK has provided coaching for staff and board that align with resources developed for members. “A lot of the trainings that have been offered to staff and board members are some of the same speakers that attend our conferences. It’s a continuum of the same concepts and values and conversations that are made available externally and internally,” a PEAK insider explained. Even for skills-based training and coaching not explicitly focused on equity, PEAK now hires “consultants that have cultural competency, so they’re building in the racial equity even when they’re doing facilitation training.”

“We are trying to promote a culture of learning internally, trying to apply our values to our internal operations.”

-PEAK staff

Internal culture and practices. Insiders agreed that numerous changes have helped PEAK’s internal culture and practices better center equity. “Internally there have been many changes,” one said. “What PEAK leaders are trying to do is provide a people-centered workplace that takes into account the lives we have outside the office.” Another remarked, “The culture piece is probably the most difficult to tackle, but PEAK has made huge strides, really addressing inequities within the organization and whose voices get elevated within the organization.” Specific changes offered as examples include:

- An equity lens on salaries and family leave policies, including regular reviews of how PEAK’s salary bands compare with the sector.
- A routine practice of listing salary bands in all job postings, offering transparency to staff and candidates.
- Policies to help staff care for themselves and protect their personal time, guiding how to manage incoming requests from members.
- Improved practice of respecting colleagues’ time when scheduling and running meetings.
- A communications branding guide that identifies shared language to use in describing ethnicity, gender, and other demographic characteristics. The guide was developed through conversations and reviews by all staff.
- A culture of overtly discussing whether every decision centers equity and lives up to PEAK’s values.
- An annual anonymous staff survey to invite feedback on organizational leadership and culture.

Internal cultural shifts at PEAK have occurred in tandem with a period of higher staff turnover. Multiple insiders linked these experiences, suggesting that losing some staff as the organization evolved was a necessary side effect of ensuring that the staff embodied the new culture. As one put it, “There has been a turnover of staff, and I think a lot of that’s related to tensions that have come up. The culture doesn’t always agree with everyone. In order to build a new culture, you do have to have some level of turnover.” Staff noted that there were no departures in 2022 and that PEAK earned high marks on the latest Great Place to Work survey.

“It’s really important that we have shared language around how we describe people in our network and in our writing.”

-PEAK staff

LESSONS FOR PSOS AND PHILANTHROPY ON ADDRESSING RACIAL EQUITY

Funders and philanthropy-serving organizations can learn from PEAK Grantmaking’s experiences in taking on racial equity as a central focus. The following key lessons emerged from the insider interviews:

Finding a cohesive starting place and rationale with staff and board is critical. PEAK insiders agreed that for all organizations exploring their role in equity issues, “It’s important to ask why you are trying to do this. It’s not just because it’s a popular thing to do. Getting very clear on the ‘why’ is a really good start because it’s very difficult to make a case for something when you don’t know why you’re doing it,” as one put it. Another added, “There has to be some internal dialogue. That cohesion and alignment can really be the foundation of where you go from there.” Furthermore, a staff member advised “developing shared language and shared goals [including] what we mean when we say ‘equity’ because there are so many ways to look at it—accessibility, race, economics.”

“There has to be a transparent opportunity to sit as a staff and as a board and say, ‘Is this important to us?’”

-PEAK staff

Leadership commitment matters—and support is available. Multiple PEAK staff noted that strong leadership is a key driver of changing culture and practices. “It’s about the leadership,” one said. “They have the responsibility to lead [even if] they’re not comfortable in that space. We are blessed that our CEO and COO are all in on this and have the humility to realize that they can’t just do a staff meeting or an exercise or whatever and [instantly achieve equity]. There’s no magic bullet.”

At the same time, leaders should understand that resources abound to help them build knowledge, make the business case for equity, approach uncomfortable conversations (see inset), and create more equitable policies and practices. PEAK insiders recommended consulting with colleagues; finding peer learning groups; bringing in experts to facilitate, guide, and support; and using existing tools—from PEAK and many other organizations.

“In many organizations, it’s easier to listen to an outside expert.”

-PEAK staff

Spreading responsibility helps integrate equity into the culture. Advancing racial equity in an organization and its mission-driven work takes everyone doing their part to reflect, learn, and make a change. A PEAK staff member asserted, “It’s really important that each person takes responsibility for their role in [equity work]. Everyone on staff needs to be brave and speak up in whatever way they want—one-on-one with their supervisor, whatever it is—and advocate for the support that we need individually and collectively to make change.” In addition, people must take responsibility for doing their homework on this issue. While each person possesses unique lived experience and understanding, bringing an openness to ongoing learning is a shared part of embracing equity. The same staff member suggested, “You need to self-educate. Maybe you’d rather read that historical fiction but immerse yourself in learning. Informally communicating with your peers is a good start. Find a buddy on staff and take some time and do that together.”

Building trust, listening, and changing takes time. Diving immediately into uncomfortable conversations without first building trust is likely to backfire and limit progress. The process of exploring how racial equity shows up at work requires care and time. “Trust is necessary among the group to educate themselves and learn more,” emphasized a PEAK staff member. When staff feel safe about being vulnerable, they can “be open to hearing what others are thinking, [recognize] their stumbling blocks, listen to the experiences of people who are not like them and use it as a way to understand the challenges from the individual to the systemic level. [Racial equity work] needs to be done deliberately. It’s a constantly evolving long-term commitment.” Another insider urged “giving people time to actually take in this stuff. Some of it is really heavy. You can’t just go to a two-hour meeting and be changed. Have the space to practice and get it wrong.”

Board changes require purposeful support. Obtaining buy-in from board members and building an equity-focused board are separate tasks from driving racial equity among staff. As a PEAK board member put it, “[Avoid] this magical thinking that just because you’re talking about DEI that your board’s going to reflect that. Make sure you are recruiting board members from a variety of places and examine not just racial composition, but geographic diversity, age diversity, career trajectory, types of organizations they come from, sexual orientation. Who are the populations you’re serving and is your board representative of that?” Board members, like staff, can benefit from coaching and outside facilitators, who can help the board better support the organization’s equity goals. A PEAK insider suggested, “Expertise from the outside [can] help convince board members about the importance of this issue and why it needs to be resourced and prioritized.”

Three Helpful Steps for Uncomfortable Conversations

A PEAK staff member offered these tips for easing into conversations about sensitive topics like racial equity within an organization:

Set ground rules. For example, keep conversations and names confidential, which can calm people down. Also, come to the table expecting to hear different perspectives and try not to take differences of opinion personally.

Step up, step back. If you're someone who talks a lot, be mindful of talking less and giving others space. Spend more time on warm up to ready more people to speak up.

Take breaks. Plan in and watch for people needing breaks when the conversation is heavy or emotional. Fifteen minutes of break time for every hour of conversation is a guideline.

“This work is hard. It requires many iterations. It needs to come from the top down and trickle up from staff working directly with members or grantees.”

-PEAK staff

Each organization has a potential role in collective work to change the field. Driving racial equity across philanthropy will take collective action, not just change within separate organizations. A PEAK insider asserted, “We have a unique opportunity as PSOs to work collectively. It’s always harder and time consuming to do that, but it really pays off because we have more power with our collective voice. We can all start pushing the field in similar directions.” In addition, from a business perspective a leader advised thinking about “embedding [racial equity] fully into the business model so that if someone tries to work with you, they can’t work around it.” For membership organizations, the leader cautioned, “If you lose members, are you going to be so close to the financial line that your staff are going to be in jeopardy? You’ve got to have a bit of cushion because some folks are not going to like you zeroing in on a direction that they’re not comfortable with.”

THE JOURNEY CONTINUES

Insiders at PEAK Grantmaking readily shared what they are continuing to work on and where they hope to improve as they progress on their racial equity journey. They offered the following examples of ongoing work and needs:

LOOKING AHEAD: FURTHER INTERNAL AND EXTERNAL RACIAL EQUITY EFFORTS AT PEAK	
Ongoing Internal Work	Ongoing External Work
<ul style="list-style-type: none"> • Continue to build and shape the organizational culture to embrace racial equity and consider group preferences more than individual preferences as the staff size grows. • Continue to develop operational policies to streamline processes as the staff grows, ensuring transparency, consistency, and greater professionalism. • Further break down the silos that separate work in different departments to better unify PEAK’s culture. 	<ul style="list-style-type: none"> • Onboard a new evaluation consultant to bring in expertise around new approaches to determine if and how people are engaging with PEAK’s practices and resources. • Measure progress on PEAK’s overall mission, goals, and milestones, rather than focusing on evaluating the success of each program or department. • Push back on PEAK’s funders when they continue harmful practices, even at the cost of leaving money on the table.
Additional internal needs	Additional external needs
<ul style="list-style-type: none"> • Attend more closely to staff mental health. 	<ul style="list-style-type: none"> • Routinely examine contracts and event planning to consider where to hold events in different states and how to take a stand against discriminatory laws and policies.