

# Interim Report

## Insights from Professionals Doing “Knowledge Work” Envisioning a New Community Space for the Field

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Knowledge work in philanthropy is a growing function and an emerging field within the philanthropic sector. Building knowledge has been part of formalized philanthropy since its very beginnings. As the number and types of foundations have expanded over the past decade so too has the interest in knowledge work in the sector.

If we set aside the jargon and become title agnostic, we recognize that a large proportion of knowledge work in philanthropy is essentially about “shared meaning making.” It is about developing and managing processes where people come together to acknowledge their frameworks, speak their lived experience, and express desires and craft actions toward a better world.<sup>1</sup>

Today, there are countless knowledge titles, activities, and job responsibilities that philanthropy professionals are engaging in to support missions across the foundations and giving entities.

**Knowledge Work as Shared Meaning Making**  
functional areas as represented in job titles

administration, advocacy evaluation, analytics, archives, assessment and learning, awards, business solutions, business, capacity building, capacity building analytics, community investment, community research, content management, contracts, controller, core services, data, data discovery, data insights, data management, data standards, data strategy, data systems, data visualization, database operations, development, education and research, equity, evaluation, evaluation and learning, events, evidence and learning, finance, grants, grants and learning, information, information systems, information technology, innovation, knowledge, knowledge insights, knowledge management, knowledge services, learning, learning and engagement, learning and reporting, measurement and evaluation, office management, operations, partnerships, planning, program effectiveness, relations analysis, relationship, reporting, research and development, research services, research, scientific affairs, social impact, strategic learning, success measure partnerships...

As the sector seeks to tap into the potential of knowledge work, there is an increasing need to further define what it often involves and looks like, not from outside models or approaches, but from inside philanthropy, with the people who focus on knowledge work daily within the sector.

In late 2025, with support from the Robert Wood Johnson Foundation, Ari Kramer, the foundation’s Knowledge Management Director, partnered with Knowledge Designs to Change and provided funds to continue “incubating” next steps for strengthening knowledge work in the sector.

Together, we invited a small group of colleagues from foundations and sector infrastructure organizations to discuss the general concept of knowledge work in philanthropy, lessons learned from past definitional and community building efforts, and what might be next for our emerging field. With their input, we designed two knowledge “incubation” discussions with larger and broader audiences.

The following text provides a brief background of the lead up to the incubation conversations and discussion highlights from colleagues at all stages of their knowledge journeys.

*(Note: The interpretations shared here are from the perspective of Angela Frusciante of Knowledge Designs to Change and should not be taken as indication of any partner or participant intentions or commitments.)*

### **Knowledge Opportunity Scan**

Angela had been presenting at the PEAK annual conference since 2018 and each year the interest in knowledge work, as evidenced by the number of people in the room, had increased exponentially. PEAK’s leadership noted this and, in 2023, PEAK’s knowledge office partnered with Knowledge Designs to Change to conduct a *Knowledge Opportunity Scan*.<sup>2</sup>

At the time of the scan, a quick review of PEAK’s membership list indicated that over 17% of members currently held a title that indicated a responsibility for some aspect of knowledge work. We know that there are many additional philanthropy professionals that may not have a dedicated title but do have knowledge activities inside their job descriptions.

Given that PEAK’s membership was over 8000, this percentage can serve as one proxy indicator of an emerging field. In addition, this review also showed that 70% of members with knowledge related titles had joined PEAK in the prior four years. Thirty percent of members with knowledge related titles had entered philanthropy as a profession in that same four-year period. Both these data points indicate a newness and growth to knowledge work in the sector.

PEAK leadership, PEAK staff, and a member advisory group were interested in learning who is involved in knowledge work; how knowledge work is showing up for grants professionals; what challenges are posed in knowledge work that emphasizes equitable change; and what are the desires of grants professionals for their knowledge work.

During the scan, colleagues participated in one or a combination of information gathering activities including an online survey (51 responses), a conference pre-session workshop (25 participants), insight groups (28 attendees), and a 2024 conference session to share the findings and specifically discuss the competencies – frameworks, practices and skills -- needed for a successful knowledge practice. As a result of the scan, PEAK added knowledge work, with a focus on meaning making and lived experience, as a key category of their revised competency model for grants professionals.<sup>3</sup>

### **Highlights:**

A key proposition that emerged from the scan was that, although knowledge work in the sector is not new, there are new possibilities. More specifically, there are:

- Many more knowledge related titles, job functions and activities for those who are doing knowledge work than even a few years ago.
- Continued challenges involved in defining knowledge work but “shared meaning making” seemed to resonate as a jargon free option.
- Various locations for knowledge work across organizations with larger foundations creating unique roles and philanthropic professionals in smaller staffed organizations having to incorporate knowledge work while juggling multiple functions.
- Exciting new change-focused approaches to grantmaking that can benefit from alignment of knowledge practices.
- Desires for more intentionality, and even advocacy, around knowledge work; time and spaces for peers to build practice together; acknowledgement of the various background fields from which knowledge professionals enter philanthropy; and recognition of the ways that knowledge work is inextricably linked to change management.

During the scan process, I also heard anecdotally that knowledge colleagues were in a specific predicament.

- Training that comes from outside the sector often doesn’t align with the realities of philanthropic work. In some cases, the language and concepts seem too corporate. In other cases, the training doesn’t take into consideration the power dynamics embedded in grantmaking relationships. Also, offerings usually don’t align with current trends in giving practice such as trust based philanthropy.
- Colleagues are having a difficult time conveying what knowledge work is in a sector that has become hyper focused on evaluation and data generation. The deeper understandings of knowledge work being an active and collaborative endeavor – not passive or simply about tracking and compliance -- are not yet infused across the sector.
- Also, there is a growing sense that knowledge professionals need to both stay connected to colleagues in their foundations and membership organizations and yet want a way to come together in spaces where knowledge practice is at the center of the discussion. Sometimes because of small staff sizes, and sometimes because of silos in larger foundations, knowledge professionals are feeling somewhat alone and are not finding opportunities to connect in an organized way within the current philanthropic infrastructure space.

It was also during the scan process that I met Ari Kramer. Our conversation at a table at a PEAK convening sparked a continued dialogue that then led to collaboration with Ari and support from the Robert Wood Johnson Foundation for this discovery effort.

### **Knowledge Incubation**

In 2025, the knowledge “incubation” dialogues built on the PEAK scan and moved forward in four important ways, ultimately attracting the interest of more than 90 philanthropy professionals.

- The idea of incubation meant that we were not just seeking to understand the field, but to build the field together from the start.
- Although our first planning discussion was with colleagues who had been in the philanthropy knowledge space for some time, we quickly included professionals of all experience levels, with various titles and organizational roles.

- We intentionally invited peers from across multiple philanthropy membership organizations to try to draw participation from silos that might also exist in foundations themselves. Even though this was a stated intention, it was quite interesting to see the variety in participants' official roles.
- We held two virtual conversations. We intentionally designed these meetings, not to plan how to form a group, but to be together as a community discussing knowledge-related practice.

### **Highlights:**

It was affirming to see how the explicit intention of coming together across silos showed up across the ninety people who expressed interest by registering or reaching out. There was clear variation of participants within their organizational hierarchy and also across functional areas.

Representing the prevalence across organizational structure, titles included:

Assistant, Associate, Analyst, Coordinator, Advisor, Consultant, Lead, Director, Senior Director, Executive Director, Chief Executive Director, Principal, Specialist, Administrator, Vice President, Head Of... Officer, Chief Officer, Senior Officer, Manager, Senior Manager, Managing Director.

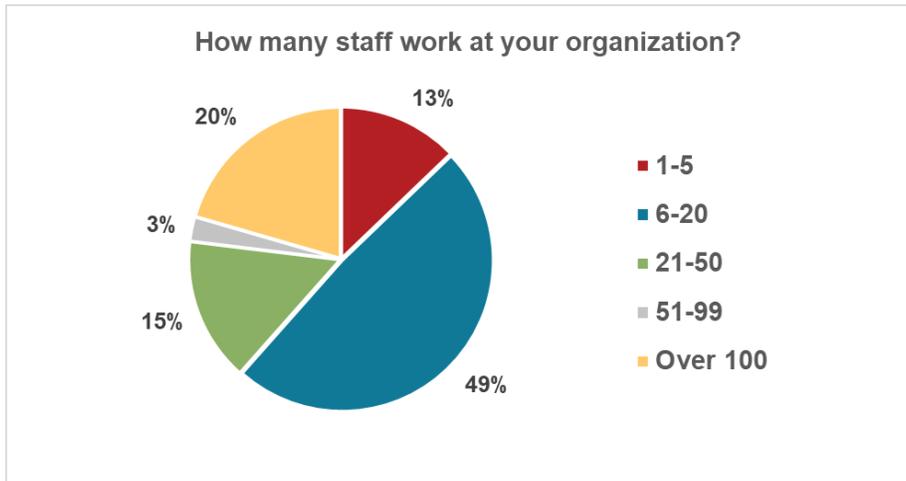
Representing the reach across philanthropic roles both internally and externally focused, areas where participants sat within their respective organizations included:

administration, grants, operations, office management, archives, awards, business, business solutions, capacity building, controller, community investment, core services, data, data insights, development, knowledge, knowledge management, knowledge services, learning, equity, evaluation, research, finance, information, information systems, information technology, evaluation, events, reporting, planning, data strategy, contracts, relationship, partnerships.

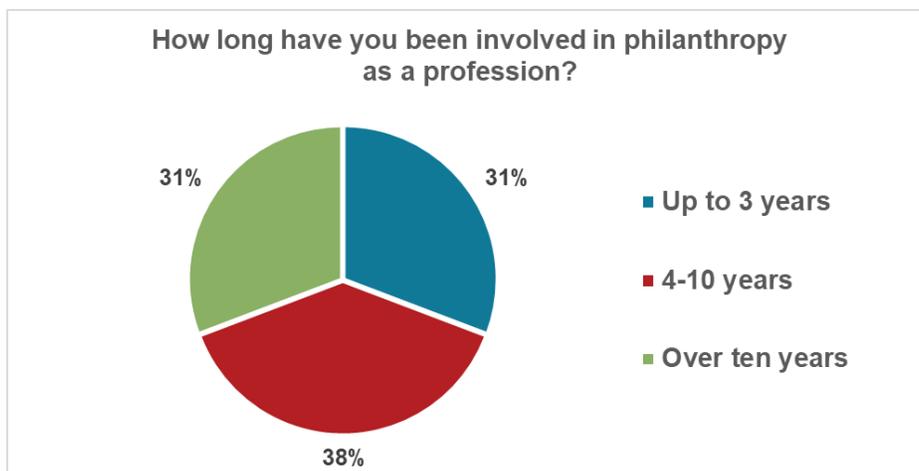
Of the ninety people who expressed interest, thirty-nine people responded to the online survey. Even though this survey offers just a snapshot of the field, the breadth of those interested in the incubation conversations is important to highlight.

The responses showed variation across organization size, experience in philanthropy and familiarity with knowledge work within the sector.

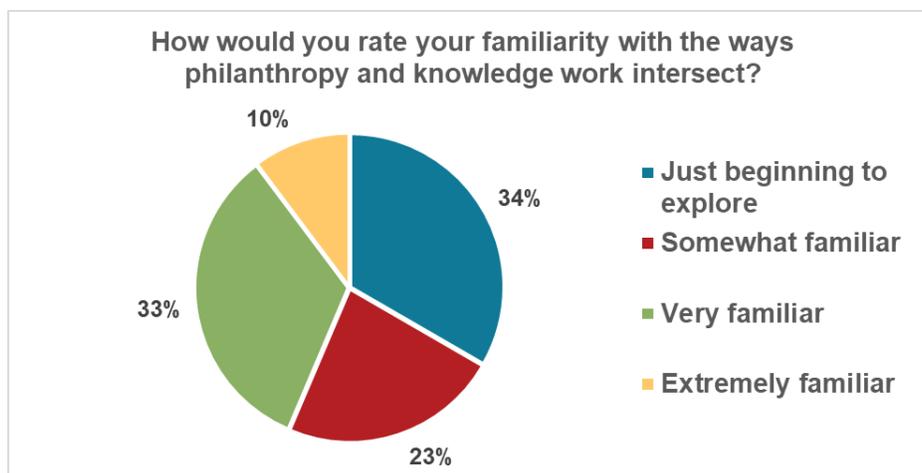
**Breadth by organization size.**



**Breadth by years in philanthropy.**



**Breadth by familiarity with the field.**



Across this variation, there was excitement expressed in the survey responses, meetings, and one-on-one conversations. Participants acknowledged that effective knowledge building in philanthropy demands strategic collaboration involving all parts of an organization, while also noting that sector professionals involved in different areas of knowledge building often don't have much ongoing opportunity to align and collaborate.

With this acknowledgment, participants seemed to resonate with the idea of an “Incubation Space” for knowledge work in philanthropy that reaches beyond the types of departmental or functional silos that exist within their organizations, silos that limit opportunities for exploring the types of intersecting perspectives that are so central to driving the impact that organizations are seeking.

In considering what this community might look like, we only began to scratch the surface with very general visions and aspirations. For instance, there was a call to avoid being located or singularly supported by any one foundation. Participants cautioned against relying solely on volunteer labor instead encouraging support for a coordinator role. Finally, there was a desire not to re-create what already exists but rather to focus on forming a generative space that does not exist elsewhere.

Desires expressed by colleagues to inform this space include:

- Regular virtual time together
- In person gathering
- Learning from peers about their knowledge practice
- Sharing of experiences and resources

Through the orchestration of this series of dialogues and much associated reflection, Angela and Ari have begun to form a shared vision akin to “design studio meets community of practice meets think tank” as a way to be creative together and show up as knowledge professionals who engage with each other by experimenting with promising knowledge practices.

### **What comes next?**

Many of us have noted the various past efforts to bring together professionals who are engaging in knowledge work. Since the work has expanded over the last few years, we now have clear documentation of the shared interest in maintaining a more consistent focus on knowledge practice, however it is titled or named across the sector.

As an interim report, this synthesis admittedly needs some specific recommendations. We will be holding one more conversation to gather ideas and determine what comes next. How do we, as a community, ensure the consistency desired? What is needed in terms of structure? What might participants bring to this shared effort – time, talent, treasure?

After that conversation, this report will be updated with recommendations from the field and shared more broadly with the sector.

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<sup>1</sup> <https://kd2change.com/2024/02/20/beyond-the-newest-philanthropy-buzzword-knowledge-work-is-core-to-equitable-change/>

<sup>2</sup> <https://kd2change.com/wp-content/uploads/2026/02/initial-findings-shared-PEAK2024-revised.pdf>

<sup>3</sup> <https://www.peakgrantmaking.org/resources/grants-professionals-competency-model/>