

The finding brief below covers highlights from PEAK's yearlong journey to better understand our members' perspectives, experiences, and challenges around knowledge work. We'd love to hear from you, and we encourage you to share your experience and perspectives about building next-level knowledge work.

Initial findings from the PEAK Grantmaking's Knowledge Exploration

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PEAK Grantmaking is at a particularly important time and place as it explores knowledge work in the philanthropic sector. Over the past decades, as philanthropy has become a recognized field, knowledge work has become a more specialized function or subfield. Various titles show up across PEAK's membership including analytics, research, measurement, evaluation, learning and reporting, data systems, data operations, strategic learning, grants and learning, knowledge management, knowledge insights, data discovery, innovation, program effectiveness, information technology and many more.

At the same time, philanthropy has struggled with knowledge work as a role. We hear of foundations and philanthropy serving organizations that have created knowledge positions only to discontinue them. We see wonderfully talented individuals who take on a knowledge function, in service to equity, only to be devalued or limited in their ability to guide their organizations toward change. We continue to hear a sense of isolation from professionals currently in those specialized responsibilities and frustrations from those who are trying to accommodate knowledge functions within already full grantmaking roles. Knowledge work adds a layer of complexity to grantmaking as it also opens up amazing possibilities in relation to equitable change.

In 2023, PEAK set out on a year-long exploration, with its partner Knowledge Designs to Change, to learn more about the emerging field of knowledge work as it is showing up and being practiced by PEAK members as grants professionals. Knowledge work is important, not only because it is core to PEAK's principle to "learn, share and evolve." When we embed equitable practices within knowledge work, we are both supporting effective grantmaking and also expanding and deepening the principles of equitable grantmaking. This brief encompasses the initial findings from this exploration.

PEAK's Knowledge Opportunity Journey

Knowledge Opportunity Scanning is a framework that focuses attention on the structures, spaces, and pathways where concepts and practices show up within a community, across a network, or in a social issue space. The framework helps us to surface beliefs, archetypes, and narratives around an issue area and leads to a mapping of opportunities for moving toward equitable social change. PEAK's opportunity journey is set within the PEAK network, with members from across the network involved in providing valuable insights into this exploration.

Knowledge Work is Not New – but there are new possibilities

Knowledge work is growing exponentially and perhaps even as a subfield in philanthropy -- but it is not new. Formal philanthropy, and thus grantmaking, has a long history with knowledge work mostly labeled as social research. We can trace knowledge work from the influence of anti-poverty efforts and neighborhood studies, through the days when early institutionalized philanthropy grasped social research studies and then used these as a way to demonstrate urban change. Later, and for the past few decades, evaluation -- as an approach and then as a field -- has commanded the knowledge space in philanthropy. More recently, the notion of shared meaning making is beginning to take hold as a way to intentionally open up the knowledge space to approaches and methods that are deliberately connected to desires for more equitable engagement and social change.

Framing knowledge as Shared Meaning Making

We live in a society with tons of information coming at us from all directions all the time. It can leave us feeling inundated and overwhelmed. Even worse, all too often, many of us have been taught that knowledge is something created outside of ourselves, by people in positions of authority. Our role is just to purchase and consume that knowledge.

However, when we frame knowledge work in its essence as shared meaning making, we acknowledge that we are social beings and we are continually creating our world together. This is especially important when we are focused on equity because it shows that change can happen and we can be conscious and intentional about it.

Within philanthropy and grantmaking it means that we don't have to be held hostage to any specific professional title, methodology or approach. We can see knowledge functions as part of an umbrella with many different tools, activities, and methods. We can choose those tools, activities, and methods that are deliberately embedded with equity intentions and practices of shared meaning making that contribute to positive social change.

Evolving Data Set

PEAK sought to lean into the idea of shared meaning making -- and talk to grants professionals who are closest to this work. The PEAK data set is still evolving. To date, we have:

- reviewed PEAK's membership list (with all personal information redacted to maintain anonymity) -- approximately 8000 entries
- solicited input from the PEAK 2023 Knowledge Deep Dive session with approximately 25 participants
- conducted a knowledge survey that had 51 responses.
- facilitated four insight groups with a total of 28 participants
- asked for input from PEAK staff members and a four-person PEAK volunteer member committee. These discussions were held with staff and committee as separate groups and also once as a staff/advisory joint discussion.

We chose to keep this exploration anonymous, so no individual participants or organizations have been identified. Our focus was on breadth of responses and documenting patterns and unique insights from grants professionals across the field. Survey responses came mostly from private foundations (59%). The participants also came from community foundations (14%), corporate giving programs, government

entities, LLCs and additional types of grantmakers. Organizational asset sizes ranged from \$10 million to above \$1 billion and staff sizes from 1 to over 100. Participation in the survey and insight groups came predominantly from organizations located across the United States with individuals identifying their organization's geographic scope from neighborhood through to global.

What is Emerging from this Exploration?

With this inquiry process, we wanted to learn who is involved in knowledge work; how knowledge work is showing up for grants professionals; what challenges are posed in knowledge work for equity and within grantmaking; and what are the desires of grants managers for their knowledge work. With this grounding in the membership, PEAK is moving toward a deeper understanding of the competencies (frameworks, practices, skills) that are important for grants professionals responsible for knowledge work. These are our initial findings.

Who is Involved in Knowledge Work?

When we focus our attention on this bigger umbrella and look at all the many titles that might be responsible for knowledge work, we calculate that approximately 17% of PEAK members have such titles. We hear in conversations that many more are being tasked with knowledge activities as part of a broader role or title. When we framed knowledge work as shared meaning making and started to lay out the various functions related to grantmaking, insight group participants noted that many grants professionals are engaging in knowledge work even when they don't call it that. This probably isn't surprising since knowledge is important across the board.

We are also seeing that professionals with specialized knowledge titles are the more recent members of PEAK. Approximately 71% of members with knowledge titles indicate that they have joined PEAK in the last four years. Over 30% of members with knowledge titles are also relatively new to philanthropy, entering into philanthropy in the last four years.

We don't know for sure why this increase in specialization and membership is happening, but we can safely connect it to the increase in philanthropic giving and to grantmaking, as a field, becoming more formalized and professionalized. It could also be that PEAK is increasingly drawing a broader audience. It could be that the notion of an information society is taking a deeper hold in the grantmaking space with more awareness that knowledge work is needed especially when focusing on equitable change. Whatever the reasons, there is a growing need to understand and support knowledge work in the sector.

How is Knowledge Work Showing Up According to Grants Professionals?

Although some PEAK members have job titles or functions that we can connect to knowledge work, some members note that they may be doing knowledge work without calling it that. Members also shared that they are bringing in an analytic approach to their work simply because that is their personal preference or mindset. Across the board, it is acknowledged that it is difficult to articulate what knowledge work is in philanthropy.

Grants professionals shared concerns that the work is not being valued or prioritized partly because it is hard to define. There is also a perception that there is never enough time allotted in grant processes to really pay attention to meaning making regardless of what it is called.

Strengthening knowledge practice is a sector-wide issue and opportunity. Whether we treat knowledge work as an emerging field itself or focus on the knowledge functions that are embedded within grantmaking, support of knowledge practice is crucial to the sector.

In addition to the various functions outlined above, those doing knowledge work are taking on various personas. Just some examples shared by participants are as “detective,” “analyst,” “the holder of the database,” “pattern finder,” and “storyteller.” They noted documenting, synthesizing and sense making. This variation is not surprising since grants professionals indicate that there is currently no unified or formal path into knowledge work in the sector.

In terms of where knowledge activity and responsibility are located inside an organization, knowledge work can show up inside a grants management role. Sometimes it is treated as a unique role. At other times, especially in larger foundations, the knowledge work might be split with a process focus aligned with understanding grant cycles and reporting and assessment of grant strategy or impact situated separately in the functions of learning or evaluation. PEAK’s exploration thus far has not gone into specific job descriptions or organizational structures. However, we suspect that the field is in a state of flux and experimentation especially in the context of contemporary philanthropic approaches that center equity.

What are the Challenges of Knowledge Work for Equity and Within Grantmaking?

Too often, conversations of strategy, equity, and learning seem to happen separately from each other and professionals doing knowledge work may be unfamiliar with bringing them together. The majority (56%) of participants in the knowledge survey noted that they feel only “somewhat familiar” with how knowledge work and equity efforts intersect.

PEAK’s exploration surfaced various challenges in relation to knowledge work and its intersection with equitable change in the context of the responsibilities of grants professionals.

Definition and Identity

Knowledge work is emerging as a specialized function within philanthropy. That function currently doesn’t have a standard definition or consensus around why it is valuable. This lack of consensus is a limitation in that it can lead to confusion, uncertainty, and shifting levels of investment. The openness can leave room for a refreshing sense of creativity and innovation in the practice of knowledge work, but it comes at the potential cost of isolation for those involved.

History and Power Imbalance

Much like philanthropy itself, when knowledge work is connected to ideas of research and academia, it is inherently grounded in a history of inequitable distribution of resources and carries the baggage of past oppressive and harmful designs and actions. In knowledge work today, there remain questions about power and who gets to make decisions throughout a knowledge process and who ultimately benefits.

Alignment and Engagement

Grants professionals are increasingly seeking to align knowledge approaches with more engaged philanthropic trends that prioritize authentic and trusting relationships with grantees and communities. This calls for addressing embedded power structures, embracing partnership as a principle, and seeking to minimize grantee and community burden in grantmaking processes.

Engagement in knowledge work, when it seeks to change inequitable patterns, can itself be experienced as uncomfortable or disruptive.

In addition, even when alignment and engagement do occur and communities and grantees are acknowledged for the time they invest in knowledge processes, it still may be difficult to amplify grantee and community perspectives. Grants professionals note that the data systems that they are using often require fitting responses into pre-existing formats aligned with past expectations of what information funder's need.

Pace and Linearity

There is never enough time allotted to knowledge work even when there is general acceptance that it is important to grantmaking. Grants professionals emphasized that there is also a difference between the pace of grantmaking, the pace of knowledge work and the pace of change both inside and outside organizations.

This difference exists alongside the juxtaposition of philanthropic strategy and grantmaking processes that are often understood as linear, goal oriented and numerically driven with knowledge work that is increasingly framed as non-linear, iterative, emergent and reliant on lived experience and understanding of qualitative data processes.

The above challenges are reflected in the desires that grants professionals share for strengthening their capacity for knowledge work.

What are Some Desires of Grants Professionals?

The grants professionals that participated in PEAK's knowledge survey and insight groups, either directly or as subtext within their responses, contributed ideas of how to maximize the potential of knowledge work. They note the need for unifying language and definition related to knowledge practice and also centralizing of resources across the field.

Participants noted that mapping out the phases of a knowledge process and perhaps even having an organizational assessment around knowledge work might be helpful.

Shared spaces of peer learning were highlighted as was the importance of talking about knowledge work with grants professionals engaged in various roles and not just having conversations with those who hold titles like learning and evaluation, measurement, or assessment.

Participants indicate a desire for more intentionality around knowledge work. They note that people who enter knowledge work in philanthropy may come from a more technical or academic background. Once in the role, for some, it becomes clear that knowledge work is as much about change management as any technical skill. It may be helpful to take one participant's suggestion to frame knowledge work in both aspirational and practical terms while we also move toward deeper understandings of how to tap into current technology.

Another desire that was repeated throughout our exploration is the need for advocacy around the value of knowledge work to grantmaking along with the notion that knowledge work is actually a distributed function, not to be held by just one person or department. Knowledge practice is intimately linked to culture, behaviors, and systems.

Finally, even with the intention of unifying knowledge work with a shared definition, targeted resources and focused capacity building, there was mention that we should also recognize that there needs to be room for serendipity and learning that happens unexpectedly when you are not setting out to find something. It seems that grants professionals are sensitive to the importance of maintaining an openness to learning from other sectors as well as holding space for creativity even as some formalization and field building is occurring.

What Supports Success in Knowledge Work – in relation to grantmaking and equitable change?

In the context of the initial findings above, our next step is surfacing the competencies (frameworks, practices, or skills) that are important for grants professionals responsible for knowledge work.

PEAK's knowledge opportunity scan is now shifting its gaze in this direction to name some next steps for supporting those who take on knowledge activities and roles. At PEAK 2024, we will be conducting an insight group discussion and a quick survey to surface additional insights on competencies.

Stay tuned for more about our journey!