Kerrin: Hello, and welcome to the Untapped Philanthropy podcast. I'm your host and Fluxx co-founder, Kerrin Mitchell. I've spent my career exploring technology's role and amplifying impact within our social sector, and more specifically, helping funders to learn to leverage technology and data to connect and better serve our collective causes, constituents, and communities.

In this podcast series, my team and I will profile social sector leaders, public figures, philanthropists, and industry futurists to explore this fascinating intersection of funding, technology, and policy. We're here to analyze the most critical and formative topics and trends that shape philanthropy both today and tomorrow. We hope this series leaves you inspired to think and act through a more collective and visionary lens.

This week, I'm thrilled to welcome President and CEO of PEAK Grantmaking, Satonya Fair. For those of you unfamiliar with PEAK it is an organization of 6000 grant professionals working together towards equitable, effective grantmaking practices. Above it all is my dear friend Satonya, she is just such a visionary and I have always found her to be such a point of inspiration. Satonya believes that we can align our investments, operations, policies, and our values to a true North Star of social sector impact. Satonya, thank you so much for joining us today. Welcome.

Satonya: Thank you, Kerrin, it is lovely to be here.

Kerrin: I have the great benefit of knowing you. But would you mind introducing yourself and sharing a little bit of backstory on who you are? And perhaps the lens of what you're bringing to today's discussion?

Satonya: Absolutely. Well, I am really, truly blessed to currently be the President and CEO for PEAK Grantmaking. PEAK is a community of people who have primarily come through operations roles into the space of philanthropy. And we are constantly trying to figure out better ways of doing the business of grantmaking. And sometimes it's a program officer at a small foundation who is looking for advice from other people who carry many hats and many roles who can say, "these are the issues that we're facing at our small organization."

And we've just found that we have a lot of people being drawn to the PEAK community. And that's how I find myself here. I had about 10 or 11 years where I was working in corporate philanthropy and working with nonprofits prior to that. And I transitioned from what I thought was a pretty busy role, managing about a $35 million portfolio along with a group of my colleagues and peers for City, and then I showed up in private philanthropy, where it was quadruple the number of funds going out the door, and just a very different environment. And so, I needed some help. And it was people who were around me who said, there's this organization called PEAK. And this was back in 2010.

The transition into private funding was right after the financial crisis, I had been working in banking, community relations, and foundation relations. So, I had gotten through the fire as they say.

And so, this was a big transition for me to come to Casey [the Casey Foundation] at 40. And I needed a very different set of skills. We will get into a little bit of why this is, and I'll share why I'm so passionate about philanthropy, technology, and nonprofits in a moment.

But mainly, it's because the roles I was tasked with at the Casey Foundation were so different. PEAK saved me because they are people you all work with every day. Those folks got in a room, a real room because we could do that, and helped me figure out how to navigate a 100-program staff and executive team that wanted a lot including customized brand new technology.

I was up for all the tasks. But it was a very different world in corporate. And then I came to work at PEAK because I have a real belief in the network because the network saved me. And my entire career has been focused on working at nonprofits with a focus on low-income children, families, and communities. And then going over into the world of being able to direct resources toward helping those very same families. This is the first time that my philanthropic work hasn't been focused on children, families, and communities. But I think PEAK is focused on everything, we have every issue area under our networks. So that's a little bit about me.

Kerrin: PEAK is truly a family and we all count on it as a way to touch base and understand the trends that are happening when we're not sitting in our bedroom slash office, trying to make sense of it all. So, I think it's a really beautiful thing. And I think what's nice is you bring to it a familiarity, and as I said, an authenticity that roots back to who you are. And I just really commend you on being able to take something like PEAK and bring your authentic self and lead with the community and then be able to execute on it, especially during the pandemic.

Satonya: When I think back about the different roles that I've had I can go back and see that some of the work that I did had staying power. And I think that's because I know that kids and families are relying on funders to help them be in a different place in space in their lives. And so, I just don't think that that's transactional, I can't be transactional for my career. And it shouldn't be transactional for the organizations that have brought me in and paid me great money and ask for my innovation and leadership. I'm also really proud to know that some of the things that we've ideated on have become their own best practices along the way. And I think that happens when you're showing up authentically in your skills and experience, but with some true love for philanthropy. I love philanthropy. I love nonprofits. And I wouldn't do this if I didn't.

Kerrin: Do you have any fun, standout stories, or funny moments that are noteworthy that you'd want to share?

Satonya: So, this was just such a great question when I read this because I thought about two things. And so, the first thing I will say, is that I had a lot of early entry into quote-unquote philanthropy and funders. But one of the funniest stories, which I think is so relevant for the techies that are listening, is my first role with City Financial Justice which at the time was located in Baltimore and had about 80,000 employees all across 20 or 30 countries.

One of the things that they had realized is that the employees were informed when there was business but not about the things that made people feel good about being at work. The community engagement, the philanthropic giving that City was doing wasn't being communicated broadly across all of the business areas. And I remember getting hired as a community relations manager thinking I knew what that meant for them and being met with a financial services wall. And I remember getting into my assignment probably the third week, they pulled me to New York, and I had never been to New York City. So that was crazy overwhelming. But then I got back to Baltimore. And they said, "we have assembled a team of people who are going to help you." And I said "okay, that's great." And they handed me six guys, who were working in business technology. And they were deep into security and all this

other stuff. And they were like, "here's Satonya, she's going work with you on creating this intranet."

I didn't know what was happening. I had never been exposed to tech, all the IT folks, no one prepared me for any of that. And I just give them credit for being so freaking patient with me because I think it was a pivotal role in my career. And I had all this passion and love for the community and everything else. But if you're not getting the word out on all that you're doing, it just has no impact. And so, I appreciate that City wanted to make sure that all of its 300,000 employees could be engaged in the community and what they thought of as "the softer side" of their work so to speak.

But it was really funny to get this assignment, I think I know I'm doing, and then hand it off to this team, who was most interested in security, something I was totally unfamiliar with. So, I just got pulled into the world of technology and security in the most circuitous way. And I and I just I'm so grateful for the patience that was shown to me. And I learned so much from those folks. And the first three years were just an education, but it set me on a path for every other job I've ever had. I always get pulled into tech somehow. And I love it, and I'm ready for the opportunity and the challenge of it. And those six team members really taught me some incredible new skills.

Kerrin: It's amazing how little things like that can change the trajectory of your career.

Satonya: Yes, I did not know that I needed to care about how you keep a business secure while sharing good news with employees. I didn't know how hard this was going to be. But I also know that once we figured it out, the impact was amazing. And it was so wonderful to hear people say, "I didn't know City was doing this, I didn't know I could be engaged and involved." And so, once we cleared the hurdles, and we were actually able to grow into this real employee information and engagement, it was amazing how we then were able to activate 1000s of people and communities to go do good stuff. And so, it had a ripple effect. But it started off by me getting a quick education on how we were going figure out the technology.

Kerrin: Awesome. I agree. Let's pivot into the future and examine PEAK and where things are headed. Our industry is one that is obviously ripe with gobs of things that we can do, whether it's in security, data, applications, operations, or even just programs. So, it's interesting when we talk through the need to solve many of those human problems with technology. And we've heard you describe philanthropic tech as something that's less about the technology, but more about the grantmaking and giving credit where credit is due. Can you expand a little on that? I'd love to hear a little bit about that philosophy.

Satonya: Absolutely. I know that I've had the responsibility as a project manager, to think about how to integrate seamless technology into the full lifecycle of grant investments. And so, I do believe that folks like myself have had to really think about that start-to-end and figure out how technologies and different types of application platforms have to come together to serve everybody's agenda, right?

Whether it's reporting for the executives and the board, or whether it's making sure that you're getting certain data back to your grantees at certain periods of time, budgeting is everything. And what I would love for folks to do a better job of is recognizing how great it is that our ideas become the platforms for the way technology is built. But I often have not necessarily seen this recognition for the practitioners doing the work — the people who are our PEAK community.

Were in there trying to figure how we can use technology to bridge the gap. And then we build platforms or customize platforms like Fluxx, and we add all these different pieces to it to get to the unique snowflake nature of it. But we also know all this technology and program work has to be duplicated and so on and so forth. And it becomes the basis of things. And I haven't always witnessed recognition for the practitioners and the work they are really creating, and it's their work that becomes an amazing foundation for how technology goes and executes. And I actually do believe that that takes away sometimes from our ability to go far and fast.

And so, my thing is if you take all technology away, I still need to make grants. If I am in charge of grants management at X organization, and there's no computer, if there's no anything, I still have to fund these grant investments. The key is that I get that done. And then I tell you how I did it. And you can create the technology that helps me, but give me credit for giving you the blueprint for how we needed to do the work. And I'm going to give you credit that you created the technology. But I do believe that sometimes I hear the practitioners not talking as partners with tech, and tech not talking as partners with the practitioners. So, if you've got something and I've got something, but we need it together to get the thing done, that's called partnership. I'm not a grantee, and you're not my funder, right? We're partners. And that's what I'm hoping to see a little bit more with tech. Technologists should recognize that there are those of us who've been out there pre-tech, figuring this stuff out. And we can do so much better together, building it from the beginning, not after it's launched.

Kerrin: What's a very interesting concept, this partnership in technology between grantmakers, us, and affiliation groups. But even with the grantees, we should ask whether we are being equitable. And it's funny because sometimes I would say, I don't feel like technology has a seat at that table all the time. But we're starting to have it and we're starting to see it.

But this ecosystem relies on each other. And there are so many different initiatives afoot with the common app and things of that nature. But for the purposes of the group here, common applications, common data models, the ways we come together are in focus. So, I think there's this interesting discussion around like, how do we all work together? And where do we have a role in that? And I guess my question to you is, in light of all this data capture, these processes, what do you see as PEAK's ultimate role in that?

Satonya: So, I am going to answer that. But I'm also going to share one thing. If you are a grants manager, director, associate assistant program officer, program manager, program director, if you're doing this well, I don't show up without first talking to my nonprofits. Like that's the one thing right, I know that the time that I've spent listening to how nonprofits interface with our organization, with our program staff, with our executives, with our reports, with our application, informs everything.

I should be bold enough to just invite the nonprofit. So, I hear you on that call to action that we should stop thinking that we've captured the voice of the nonprofits who we fund. And when I say "we" I am speaking on behalf of the 500 plus foundations that PEAK really tries to support in all that we do every day. But if the proverbial "we" is the funder, we have to do a better job of making space at the table for our nonprofits to be there.

To your point, Kerrin, as we think about just going from vision to execution, there is a ton of room for growth. And I will say that that is what PEAK is espousing. This is what we're trying to say, which is that we are coming to the table because I might have an individual person who says "Satonya as the grants manager at my organization, which is an organization of 20 people.

No one's listening to me." And I'm spending a lot of time with our nonprofits listening. I'm talking to other foundations and learning what's going on with their processes. I'm having a hard time myself getting to the table of decision-making and in strategy. We as an organization, are here to advocate for the individual, sometimes the department, and sometimes the whole sector.

Getting money from a funder has become fraught with barriers and technology that we do not understand. And when I say "we" now I'm flipping, I'm putting on my nonprofit hat. We've got a heads up and a leg up on understanding how to crack the code on getting this money because philanthropy is both our member and our client. Most nonprofits never get the opportunity to be in rooms with philanthropy and also be able to be honest about the processes that we encounter. And I would just say that I think PEAK has a very specific role in telling our own stories. And we've been put in our own box of trying to secure funding, and it's a great representational story.

I'm spending a lot of my time in the organization digging into this, listening to our private charities and our nonprofits, our community foundations who are doing grantmaking and grantseeking, so we can make sure we are hearing as many voices as possible around the philanthropic table and be able to go back to foundations and share.

You all understand that if we say that 30 to 40% of your applications are all the same, then there's an opportunity here to streamline. That's huge. And so, what I will say is that there is definitely a lot of investment going out the door and being duplicated, triplicated and if we started thinking about time and resources, I do believe that we can do better as it relates to grantmaking. I think it's PEAK's role, with love and respect, to speak honesty with our funders and members to help them understand that you can get to equity through effective practices. Also, your great mission and strategies can be undermined by bad practice. And I think that's PEAK's role in this moment.

And even at Casey [Foundation] we had all these states giving us lots of data. Well, there's a ton of data in there that Casey's paying to collect that then is only used for Casey. And there have been people who've come and said, what's the opportunity to maybe get some of that data out into the world? So that's yet another example of how we could be thinking about the role. And so, I do believe that there are a million opportunities for us to really move the needle. But you're right, we all must be at the table. And that's what PEAK is doing. Right now, we are advocating for a broader table. We are advocating for nonprofits and funders to be partners with technology. All the other peripheral services, human resources, everybody who's supporting us to be better and get to equity, we all need to be in the room together. And it's not been our norm. So that's kind of where I'm seeing this.

Kerrin: I think, honestly, that beckons us into this conversation about transparency and availability of information. Everyone should have a seat at the table. I mean, as much as we talk about heavily influencing diversity, equity and inclusion, those are the types of things that have to start happening to commit to that effort and drastically change it.

And there are things that you may see as an affiliation lead. And I think that's the part that we need to look at and improve. So, I'm pleased to see that change is happening. But at the same time this is challenging the muscle memory that foundations have in their bones.

One of my favorite quotes is from Dr. Martin Luther King who promoted the vision of a beloved community where all destinies are interwoven together. All boats rise in the tide of prosperity,

equality, and justice. You and I have talked about this before. And you've mentioned to me that it was imperative that organizations look to the future and carve out practices to support work and build equity into that. And I think that's a really nice transition into another thing that I look to you as a leader in which is: what are some of the ways that you would call for technologists and funders to approach DEI in light of this idea that they need to be showing up for the collective, which is a much bigger pot than perhaps they realized?

Satonya: Well, I think the advance of equity is an inside-outside exercise. If anyone's been listening to us, they know it is really important.

Kerrin: I totally stole that from you by the way. I give you credit for it. I love that concept of being able to think of it in both ways.

Satonya: If I tell you that I want to advance equity, it's not just about who's inside the organization, but this work includes all the folks who are outside as well. The folks that we say, we are trying to go toward helping. And so, to think about DEI and all the different opportunity areas, all the technology vendors, we have to communicate with everyone who's working in this space and agree on the importance of equity.

Because the other thing is I have so many people who reach out to me about this topic and work. And to be honest with you, I don't even know how they got to this equity stage other than the fact that it's a great moneymaker right now, I don't even see how they're living it and advancing the work — I see missing pieces along the way.

And what I'd like is an internal commitment that while you are building platforms that philanthropy and nonprofits use to advance their work consider the fact that if you are working to advance equity, how you work has completely shifted, and your client shouldn't miss that. And I do think that there's a real opportunity for those of us who really care about creating great technology to support the sector, to really think about the fact that you get the opportunity to say, "hey, I looked at your scope of work and all that you would like to do through your processes, and I didn't see equity. But here are some things that we've already done with a few other clients that you might want to consider embedding your demographic or data collection, and you might want to consider these three questions for your program staff to answer about how these grant investments are advancing equity." I'd like to see technology get a little bit more forward in proposing that all funders really start to get there.

And it's not about the funder saying to Fluxx "hey this is what we want." I really want to see it flipped around and all of us kind of meeting in the middle. And equity is reached when processes and practices are streamlined and right sized for who the nonprofit is. And if you give Harvard an application, and then you give my West Baltimore kids advocacy group the same application, that's interesting. Those are two different entities. And as a funder you know that you and I could get on GuideStar and in five minutes have a lot of information about these nonprofits. And funders need to understand that it's not a one size fits all approach if you want to fund capacity. And if you are not funding capacity, you must be agile and nimble. All those things that people in technology talk about all the time, flexibility, agility, nimbleness, you can create that in your grant application.

For example, if you ask what's your overall annual budget and I the nonprofit select 250,000? That right there should eliminate about 25 questions on your application and 10 questions on your report. That's what technology can do for you if you're interested in doing it that way. And

that is why I said if you're not comfortable talking about racial equity or the history of this country that's really screwed up. Because you understand that you can actually advance equity by just having appropriate right size processes. And I think tech and the funder can be meeting in the middle of that and in small ways and in larger ways advancing diversity, equity and inclusion, but in particular, equity in the process of how we make grants. I think it's possible, but I also am fine with the fact that a family foundation starting with Fluxx may not know what they need. And I want Fluxx to tell them what you've done for some other people advance them on their DEI track.

Kerrin: Absolutely. I think one of the things that's very interesting about that is the idea of "I just need to practice DEI because that's what I need to do." And I don't implicate any of our clients of doing that so much as they come to us and we say, "look, there are a couple of ways we've seen it happen." And the truth is, we're still kind of searching and asking what is better? How do we make sure it's not just about the data, but it's the application of the data or expedited grants that technology can help ease those functions for what they're trying to do?

And I think that's something that we take on in a very real way and our clients are a part of it too. It's this interesting sort of chicken and egg where we don't want to be too prescriptive about what we're what we think is best, but we see a lot of permutations of it. So, it's an interesting way to continue to refine. But I think what really captured me is when you talked a little bit about agility. The last two years were kind of a dumpster fire with so many things going on. There was a character that was developed in that darkness. And I look at things like that and the silver lining of it all is that there were positive experiences, innovations, and unexpected outcomes that moved us forward as an industry that never would have happened otherwise.

What's something that you've seen show up that you hope to see more of? I think your perspective is so positive and lovely. And I just enjoy your positivity bring to everything. So, I'd love to hear, what do you think we should improve upon to be better?

Satonya: I'm going to start with something that sounds a bit negative, but it's only to get to the joy. I hope that funders continue to listen to what their nonprofits need. I believe that we all have to get through this crisis and there was a responsiveness and acts of listening that occurred immediately. And I'll talk about my own experience as a person making grants to grassroots organizations on behalf of my organization right at the beginning of the pandemic versus when we made a series of grants early in the year.

So, we had made a few grants and we were looking at the larger strategy for the year. I started reaching out to nonprofits immediately. I couldn't get them on the phone or get an email responded to. So, we were reaching out to nonprofits hoping that they would respond while forgetting that they were being drawn on in a way that they had never been drawn on in history — especially if they were in communities that were being impacted by the pandemic. And so I could hear funders saying: "I've called my grantee several times, and they're not calling me back." They were a little snippy about it. But I'm like, you guys, the world is on fire. And we don't even know what's happening.

And so, one of the things I did was I went to our executive and I said, "are you okay with me just sending extra money to everybody we've already given a grant to." We already had ACH forms executed so we just sent people money. And it wasn't just willy nilly because they were all within our mission areas. We weren't just handing out checks. But we just decided to say we know that you're on the ground. We know you're overwhelmed. And without you telling us anything we've

already taken you through a vetting process because we've already funded you. We're sending you some additional support and we are reachable when you need.

So, I really do hope to see more of that kind of responsiveness and listening more than anything. We do have to be open to the fact that nonprofits are the ones on the ground, they're doing the work, and we want to help them. I am a nonprofit, right? And I think the work we do is really important, and it can be overwhelming at times. And I think that the relationships that we have built must serve us as we go forward. And I do hope that there are people are talking about trust-based philanthropy. And that bothers me a bit because I'm not sure what PEAK did to make people not trust us. We have clean audits, we have been in good standing for 25 years, and we've done great programming. We've done a lot of good stuff to help the philanthropic sector without even having the money to really do it. So, I'm always wondering, what have nonprofits done to lose trust or not earn trust?

But I would like for folks to just say, "this organization has been around for 10 years on the ground doing great work and its community is endorsing it. So why don't you do it? So that's something that I hope sticks around. And I know that funders because they have dollars in money and resources, have all that they need to keep that responsive relationship moving forward and to be open to what an organization needs.

And be agile enough to be in the moment. This is not about a nonprofit trying to get general operating support grants so they can go buy leather backpacks for their team. Again, it's really about just being human and remembering that humans have done this work. There are some organizations of funders who are so on the ground have felt the impact of this and have had their own losses within their teams. And so, let's just all remember that humans do this work. And at nonprofits, sometimes it's one human, sometimes it's 1000. But the point is that our jobs are to go do the work and community that's what we have created.

Kerrin: Yes, it's about creating good capacity and then making that work effective. And I think the agility that that you spoke to is saying "listen, deploy what you need to and listen and change." And I think that's a really exciting thing. The silver lining of this last couple years is that it has challenged assumptions.

So, I'm excited to see where it goes as well, for sure. On that note let's end on what I call the rapid-fire questions. I encourage you to respond with the very first thing that comes to your mind. Are you ready? It's January. What's your New Year's resolution?

Satonya: Staying alive.

Kerrin: Ha! Alright, what is one important prediction you have for 2022 grantmaking? Or a trend it doesn't have to be a prediction.

Satonya: I have so many. It's not just one. Trend number one is going to be people really activating on equity differently. I see philanthropy starting to really gravitate to that as we learn and grow and we're on our own kind of journeys. There are places where we can do better. And I actually think that equity is being rightly utilized in many conversations, especially those led by PEAK and many of our partners to help people find the about this work. And I see it taking root and I see a very different kind of mindset toward equity. And I also do believe that this has been an interesting moment where funders have formed newer relationships to support equity. And so, I'm really excited to see this trend that's happening as some foundations rethink how the

program officers should be operating and taking away all those administrative minutiae and moving it into the right places.

And it's exciting to see that people are rethinking the role of program officers. And I know the grants management listener might be like, "what's up with that? You're talking about program officers? Because at the end of the day we're great at what we do. I think that the operations folks have really figured a ton of things out around efficiency and effectiveness. And we haven't always said to the program officer this is how we need you. And this is where we need you. And I'm seeing CEOs, I'm seeing different people start to rethink around how the whole organization should be functioning, but especially how to activate the front face of philanthropy out and community differently. It's exciting to me.

Kerrin: Absolutely. I 100 percent agree. Okay, final question. If you could snap your fingers and instantly fix one of the world's most pervasive problems, what would it be?

Satonya: Poverty. That's the root of everything. Think about poaching, about the whales not being able to get from point A to point B to nurse their young and rear the next group of the humpback whale, right?

Everything comes down to a lack of resources for individuals who then make decisions, some of them at the level of criminality to get by. And so, if there was one thing I would shoot for, I would aim to just eliminate poverty. And then what could we do? I think philanthropy would still have a ton of work to do. I think we'd all still have a ton of work to do. But I think that one is one that just hurts my soul that it continues to bring the collective down. So that would be my snap.

Kerrin: Thank you for sharing that. Satonya, thank you so much for joining the podcast today, and sharing more about yourself and your work. It was fantastic to have you. Thank you.