Building Trust Through Regular Check-Ins

A Resource for Funders

trust-based philanthropy project

An essential component of trust-building is creating space for reflective dialogue. Regular check-in conversations with grantee partners help build trust by allowing you to:

- Deepen your relationship with grantees
- Learn more about grantees' work
- Refine your understanding of how you can best be of support as a funder
- Provide your grantee partners the opportunity to pause and reflect on their work
- Shift the burden of reporting (e.g., if your organization requires some sort of documentation on grantees' progress, you can write up a brief memo on what you learned from a check-in—as opposed to requiring the grantee to write a report).

Below are some steps you can take to plan and conduct a trust-based check-in with grantees. We encourage you to tailor these steps to best suit your own trust-based journey.

During the early stages of a grantee relationship:

- [ ] **Develop clear goals for your check-ins:** Ask grantees how your conversations could be most useful for them. Ground your own intentions in listening, learning, and deepening the relationship. Be transparent about any role these conversations may play in future funding decisions, as well as any specific elements on which you will be reporting.
- [ ] **Work with your grantee partner to determine the frequency and dates of check-ins:** Check-ins can be scheduled at regular intervals, after specific project milestones, or on an ad hoc basis. Be mindful of the requests you are making on the grantee's time.
- [ ] **Collectively decide the time, location and/or platform for these conversations:** If the grantee partner is in your area, perhaps visit their office (consider whether your visit might be disruptive) or take them out for a meal nearby. Otherwise, try for face-to-face contact through a video call, while keeping in mind the grantees' ease of connectivity. For different time zones, schedule check-ins during grantee's regular working hours—even if that means rearranging your own schedule—and have an interpreter join your call if needed.
- [ ] **Emphasize your flexibility and approachability:** Reiterate that you are available if grantees would like to chat beyond these dates, or if they need to reschedule (life happens!). If they do reach out, be responsive.

Before a check-in:

- [ ] **Confirm the date, time, and location:** If you absolutely need to reschedule, give grantees as much advance notice as you can. Revisit your meeting logistics to see if they still make sense for both of you, and remind grantees to avoid spending unnecessary time creating reports or presentations
- [ ] **Try to keep your calendar clear immediately before and after your check-in:** This can help you enter your meeting fully present rather than rushing in, as well as allow you to extend your check-in a little longer if needed, preventing you from needing to abruptly cut off a meaningful conversation.
- [ ] **Do your homework:** Go through the grantee's website, social media, and/or recent newsletters to bring yourself up to speed on their recent work. If you have specific questions, send them to the grantee ahead of time so that they can think them through. The following questions can provide an initial frame: How is the work going? What are you learning, and how will that inform your work moving forward? What's on the horizon that's exciting or challenging? At the same time, think about what updates you can share about your own work that would be of interest.

During a check-in:

- [ ] **Set the tone for a trust-based, relationship-deepening conversation:** Be fully present by putting away your phone and other distractions. Create space for the personal as well as the professional. You can start simple: "What are you looking forward to this weekend?" Invite levity and humor into your conversation, and restate your intentions for checking in.
- [ ] **Don't just receive updates—share them:** Trust is a two-way street. Share news from your organization, as well as observations of sector-wide trends and challenges to acknowledge that complexity is part of the work and not something to hide or avoid.
- [ ] **Pay attention to how you are communicating throughout the conversation:** Be mindful of how the inherent power imbalance between you two shows up. Model vulnerability and authenticity to the same extent that you would like your grantee partner to. And above all, listen actively with the intention of learning. If you were to forget every item on this checklist but one, let it be this - it's that essential!
- [ ] **Ask for feedback:** Ask your grantee partner what's working well and what might not be. Also ask for ways you can further offer beyond-the-check support. At the same time, free them from the pressure of having to give an innovative, game-changing answer—welcome any thoughts they have, big or small.
- [ ] **Include time for the grantee to ask you questions:** Encourage questions about what is going on at your organization, philanthropy or grantmaking in general, what you're learning from fellow grantees, or even personal questions. If you don't know something, be honest, and follow up afterwards with the information. Clearly communicate any next steps.
- [ ] **End on a note of shared reflection:** Take a few minutes to share your major takeaways. This can help avoid misunderstandings and is a powerful way to end on a note of shared understanding and connection.

After a check-in:

- [ ] **Share your documentation:** In keeping with the trust-based principle of transparency, share any reports or memos you draft from your conversation.
- [ ] **Express your gratitude:** A simple thank you note can go a long way in letting the grantee know that they were heard.
- [ ] **Make sure these check-ins aren't the only time you are communicating:** Check-ins are only one piece of the puzzle! Recognize and congratulate grantees on personal and project milestones, send over opportunities and news relevant to them, and keep showing up to support their work.

Reflection Questions:

1. **Name at least one grantee partner with whom you can first try out this check-in process.**

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2. **What obstacles or challenges might you face in carrying out this check-in?**

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3. **What are some steps you can take to address or mitigate these challenges?**

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