Trust-Based Philanthropy Self-Reflection Tool

trust-based
philanthropy
project

Overview

Trust-based philanthropy is a holistic approach that requires alignment in a grantmaking organization's four interrelated areas: 1) practice, 2) leadership, 3) culture, and 4) values. This tool is designed to help funders at various stages of the trust-based journey examine how trust shows up across your organization, and identify areas that may need more inquiry, refinement, or deepening. While we often use the term "foundation", the tool is still relevant for any funding organization or individual.

You can fill this out as an individual staff member, or you can also consider having multiple people from your organization (staff, board, etc.) fill it out to see how your perspectives and experiences line up. Ultimately, this is a reflection tool rather than a prescriptive tool.

Instructions

Use the ranking scale at right to indicate the frequency and depth with which each statement holds true for you. Then, tally up your average score for each section to get a sense of how well the four areas are lining up, noting areas that might need greater attention. We encourage you to focus on the relative scores, rather than the absolute numbers.

In addition, consider how self-reporting bias may show up in your answers. Notice where a question challenges you, and where that may be coming from. Whether you have been practicing in a trust-based way for decades, or are just beginning your trust-based journey, this tool is an opportunity to pause, reflect, and get curious.

Ranking Scale

- **1** – Strongly disagree

- **2** – Disagree

- **3** – Neither agree nor disagree

- **4** – Agree

- **5** – Strongly agree

- **N/A** – Does not apply to your organization

PRACTICE

The details of every foundation's trust-based practice will look different based on your unique goals, needs, and challenges. That being said, there are some general principles that can guide your trust-based practices to share power in your day-to-day.

1. Our practices are continually informed by grantee feedback.

2. We give multi-year grants.

3. Our grants are unrestricted.

4. We communicate transparently with prospective and current grantees about our grantmaking priorities and decisions.

5. Our grant application process requires less time and effort than the average grant application process.

6. With prospective grantees, we do our best to do the homework and put the onus of due diligence on ourselves rather than the grantees.

7. We have a streamlined reporting process that does not require grantees to report on every detail of what they did with our grant money.

8. When it comes to reporting, we only request the information we need from grantees.

9. We carefully read everything that grantees send to us.

10. We are responsive to calls and emails from grantees and prospective grantees within 1–3 days.

11. We are intentional about offering our grantee partners support "beyond the check"
(This includes any optional non-monetary support during or after the grant term, e.g., restorative retreats, coaching or moral support, providing meeting room access, networking, introductions to other funders)

12. Our evaluation practices enable grantees to define their own measures of success.

TOTAL

AVERAGE PRACTICE SCORE

LEADERSHIP
Building a trust-based culture starts with the board and executive staff who set the tone for an organization.

BOARD OF TRUSTEES

1.	Our board strives to model humility, empathy, and vulnerability.
2.	Our board strives to model open, honest, and transparent communication.
3.	Our board creates a climate where all questions and ideas are welcome.
4.	Our board represents or engages with the perspectives of the communities we seek to serve.
5.	Our board is open to new possibilities and transformation, even when they are difficult or threatening.
6.	Our board places a high level of trust in our executive leadership and staff's decision-making.
7.	Our board's role is predominantly focused on guiding our big picture strategies and endowment (rather than approving grants or reviewing dockets).
TOTAL	
AVERAGE BOARD LEADERSHIP SCORE	

EXECUTIVE STAFF

1.	Our executive staff models humility, empathy, and vulnerability.
2.	Our executive staff models open, honest, and transparent communication.
3.	Our executive staff is not afraid to admit failure and learn from mistakes.
4.	Our executive staff places a high level of trust in staff's decision making.
5.	Our CEO/ED has culture-building in their job description.
TOTAL	
AVERAGE EXECUTIVE LEADERSHIP SCORE	

CULTURE

A practice of trust-based philanthropy begins with organizational culture —
both internally among staff members and externally with grantees.

1.	We have a culture of seeking and providing honest feedback among staff.
2.	We intentionally create time for dialogue, reflection, and learning among staff on a regular basis.
3.	We intentionally create time for difficult conversations about power, privilege, and equity on a regular basis.
4.	We are open to new possibilities and transformation, even when they are difficult or have potential risks.
5.	We acknowledge and respect grantees as experts in their work
6.	We intentionally create time for grantees to open up to us about their needs and challenges.
7.	Our approach to evaluation is focused on learning and growth rather than on holding grantees accountable to impact metrics
8.	We seek feedback from grantee partners and community members before instituting policy or practice changes.
TOTAL	
AVERAGE CULTURE SCORE	

VALUES
Trust-based foundations act upon and embody their values in the everyday.

1.	Our foundation's work is guided by a clearly articulated set of values.
2.	Our values serve as a touchstone for decision-making, especially during times of uncertainty or change.
3.	Each of our departments references our organization's values in their work (i.e. learning & evaluation, grants management, finance, legal, etc.)
4.	We believe those closest to the issues at hand are best positioned to make decisions about how resources should be allocated.
5.	Our grantee partners' perspectives and contributions are essential to our organization's strategy and goals.
6.	We believe sharing power with grantee and community partners makes us more impactful as funders.
7.	We see ourselves as accountable to our grantee partners.
8.	Reflection and learning are key to our and our grantee partners' growth and evolution.
TOTAL	
AVERAGE VALUES SCORE	

Reflection

- Has there been growth or change around these areas over the last 6–12 months? What factors contributed to that change (or lack thereof)?

- Did the prompts raise any new questions or insights about your organization as a whole?

- Which of the four areas had higher scores? Which had lower scores?

- Was there anything interesting or unexpected about how your scores turned out? Any areas with less consensus? Any contradictions?

- Of the sections that ranked lower, what are some key areas where you can make some realistic changes or adjustments?

- Of the sections that ranked higher, what are some areas where you can extend the horizon for your practice?

What is one specific area that your organization can work on over the next 6–12 months? Who needs to be involved in that process?

Next Steps

- Start a conversation with colleagues about what you learned from this exercise

- Invite other colleagues and your board to fill out the self-reflection tool and see how your answers match up (or not)

- Identify one or two concrete areas that you can realistically improve upon in the next 6–12 months

- If your organization has a strategic plan, consider incorporating Values, Culture, Leadership, and Practice more intentionally so that it becomes grounded in your overarching strategy

- **If you are earlier in your trust-based journey:**

  - Explore the Trust-Based Philanthropy Project's website for resources, stories, and upcoming events related to the areas of your practice that you'd like to deepen.

  - Reach out to the Trust-Based Philanthropy Project at hello@trustbasedphilanthropy. org — we can match you with peers who have grappled or are grappling with similar questions, as well as provide more tailored guidance on brainstorming next steps.

- **If you are further along in your trust-based philanthropy journey:**

  - What steps can you take to improve your trust-based practices in the areas you identified above?

  - What obstacles do you anticipate?

  - What steps can you take to address these challenges?

  - When would you like to take pause and reflect on your trust-based progress again? Schedule this assessment into your calendar.