



Trust-Based Philanthropy Self-Reflection Tool

EXPLORE HOW TRUST-BASED VALUES ARE SHOWING UP IN YOUR FOUNDATION'S CULTURE, STRUCTURES, LEADERSHIP, AND GRANTMAKING PRACTICES

Trust-based philanthropy is a holistic approach that centers power-conscious, equity-focused values to inform four key dimensions of a grantmaking organization's work: 1) **culture**, 2) **structures**, 3) **leadership**, and 4) **practices**. This tool is designed to help funders 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 can be adapted for any funding organization or individual. You can fill this out as an individual staff member, or have multiple people from your organization 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 to indicate how each statement holds true for your organization.
- Then, tally up your average score for each section to get a sense of how well the four areas align, noting areas in need of improvement.
- We encourage you to focus on the relative scores rather than the absolute numbers.
- Consider how self-reporting bias may show up in your answers. Also, notice where a question challenges you and get curious about why.

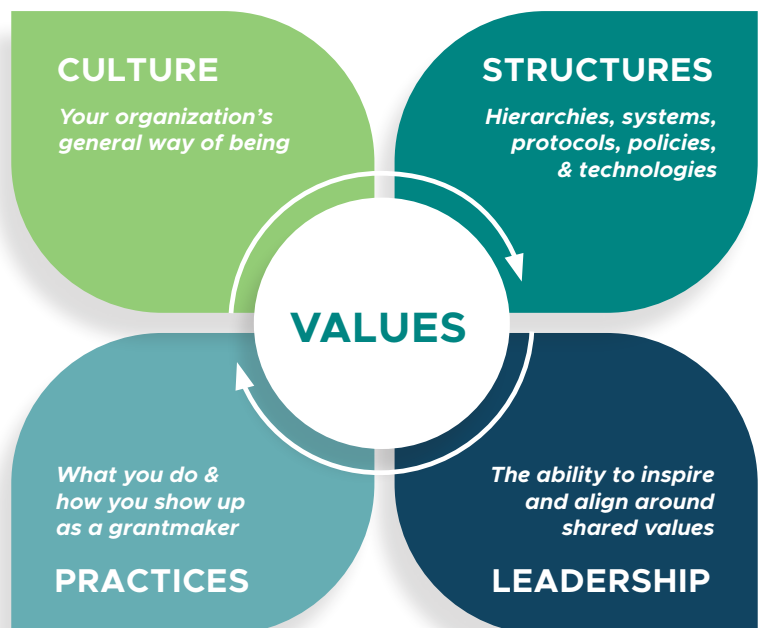
RANKING SCALE:

- 5** STRONGLY AGREE
- 4** AGREE
- 3** NEITHER AGREE NOR DISAGREE
- 2** DISAGREE
- 1** STRONGLY DISAGREE
- N/A

A NOTE ABOUT VALUES

Values are the fundamental beliefs that drive an organization's attitudes, priorities, and actions. In a trust-based context, values are the north star for all decisions and actions. Being clear on values helps organizations make decisions through moments of uncertainty or change, guides relationship-building with grantee partners, fosters internal alignment among staff and board, and informs the design of organizational systems and structures.

While this guide is not explicitly designed to help you define your values, it will illuminate whether you need to get clearer on your values, where you may need to be more intentional in aligning values to practices, or whether you need to spend more time fostering a shared understanding about your values internally.



**RANKING
SCALE:**

5 STRONGLY
AGREE

4 AGREE

3 NEITHER AGREE
NOR DISAGREE

2 DISAGREE

1 STRONGLY
DISAGREE

N/A



CULTURE

A trust-based culture is one wherein we center relationship-building and address inequitable power dynamics in every aspect of our work.

- 1) Our foundation's work is guided by a clearly articulated set of values rooted in power-consciousness and equity.
- 2) We intentionally create time for relationship-building, reflection, honest feedback, and learning among staff on a regular basis.
- 3) We intentionally create time for difficult conversations about power, privilege, ableism, race, and equity on a regular basis.
- 4) Our staff and board are committed to understanding how the philanthropy sector has historically contributed to and benefited from systemic inequities.
- 5) We understand that the issues we seek to address are both positioned within and continually shaped by systemic racism and white dominant culture.
- 6) We believe those closest to the issues at hand are best positioned to make decisions about how resources should be allocated.
- 7) We believe sharing power with grantees and community partners makes us more impactful as funders.
- 8) Our organization reinforces a culture of, first and foremost, holding ourselves accountable to the organizations and issues that we support.
- 9) We are willing to take reputational and/or financial risks to support our grantees and stand up for our values.
- 10) We seek feedback from grantee partners before instituting policy or practice changes that may affect their funding and/or their ability to do their work.

TOTAL _____

"CULTURE" AVERAGE SCORE _____



STRUCTURES

A commitment to trust-based philanthropy requires aligning organizational structures, policies, systems, and protocols with a lens of power-consciousness and systemic equity.

- 1) We take into account how white dominant culture and assumptions may be showing up in our policies and practices – and we actively work toward revising them.
- 2) We embody values of equity, collaboration, and power-sharing in our decision-making structures and processes.
- 3) We strive for leadership and staff representation that is reflective of the work we do and the communities we support.
- 4) Our hiring practices prioritize values, competencies, and lived experiences – not just academic achievement and job titles.
- 5) Our job descriptions and other onboarding documents reinforce a sense of accountability to the organizations we serve and support.
- 6) We use collective input to inform key decisions, and rarely is there a situation where one person makes a major decision or action without input from others.
- 7) Our grant management system has been designed to support relationship-building and mutual learning with our grantees, rather than focusing on extractive data gathering for the staff and board.
- 8) Our grant agreements are streamlined and are reflective of our intent to build positive relationships with our grantees. Our language emphasizes our goals for mutual partnership rather than enforcing prohibitions and penalties.
- 9) Our approach to evaluation is focused on learning about the work we support rather than attributing direct impact to our investments.
- 10) We regularly evaluate and assess how well we as a foundation are living up to our stated values.
- 11) Our investment portfolio is aligned with our values and mission; we apply negative screens to avoid investments that are counterproductive to our mission, and we seek out mission-aligned investments.
- 12) We give more than the required 5% payout annually.

TOTAL _____

“STRUCTURES” AVERAGE SCORE _____

**RANKING
SCALE:**

5 STRONGLY
AGREE

4 AGREE

3 NEITHER AGREE
NOR DISAGREE

2 DISAGREE

1 STRONGLY
DISAGREE

N/A



LEADERSHIP

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

BOARD OR ADVISORY COMMITTEE:

- 1) Our board strives to model humility, empathy, and vulnerability.
- 2) Our board is open and responds to honest feedback from staff and grantee partners.
- 3) Our board creates an inclusive, anti-racist climate that respects diverse ideas and experiences.
- 4) Our board strives to learn from and be accountable to the communities we serve.
- 5) Our board is open to new possibilities and transformation, even when they diverge from the status quo.
- 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 _____

“BOARD LEADERSHIP” AVERAGE SCORE _____

EXECUTIVE STAFF:

- 1) Our executive staff strives to create an inclusive, equitable, and anti-racist work environment and culture.
- 2) Our executive staff models open, honest, and transparent communication.
- 3) Our executive staff is actively finding ways to share/cede power with program staff, grantees, and community partners.
- 4) Our executive staff promotes a sense of accountability to the organizations and communities we serve.
- 5) Our executive staff is not afraid to admit failure and learn from mistakes.
- 6) Our executive staff places a high level of trust in staff’s decision making.
- 7) Our CEO/ED has culture-building in their job description.

TOTAL _____

“EXECUTIVE LEADERSHIP” AVERAGE SCORE _____



PRACTICES

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) At least 50% of our grants are multi-year.
- 2) The majority of our grants are unrestricted.
- 3) We communicate transparently with prospective, current, and declined grantees about our grantmaking priorities and decisions.
- 4) We apply an inclusion and accessibility lens to our materials to ensure we are using language that is respectful and nondiscriminatory.
- 5) We receive direct feedback from grantees that our application process is relevant and easeful.
- 6) When getting to know 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 intentionally create time for grantees to open up to us about their needs and challenges.
- 8) We have a learning-based reporting process that prioritizes mutual learning over detailed reports.
- 9) When it comes to applications and reporting, we have a clear rationale for each question asked, including how we intend to use the information to make a decision about a grant.
- 10) We carefully review all written, video, audio materials that grantees send to us.
- 11) We respond to calls and emails from organizations we are currently funding within 24-48 hours.
- 12) We pro-actively respond to inquiries from prospective grantees with transparency about our application process.
- 13) 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*)
- 14) Our evaluation practices enable grantees to define their own measures of success.

TOTAL _____

“PRACTICE” AVERAGE SCORE _____










REFLECTION

- 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?
- Has there been growth or change around these four areas over the last 6-12 months? What factors contributed to that change (or lack thereof)?
- Was there anything interesting or unexpected about how your scores turned out? If multiple people filled this out, were there any areas with less consensus? Any contradictions?
- Of the sections that ranked lower, where can you make some realistic changes or adjustments?
- Of the sections that ranked higher, where can you 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?
- What obstacles do you anticipate?
- When would you like to reflect on your trust-based progress again? (*schedule into your calendar*)



NEXT STEPS

-  Explore the Trust-Based Philanthropy Project's website for resources, stories, and upcoming events: www.trustbasedphilanthropy.org
-  Download our Trust-Based Philanthropy in 4D Guide to learn about using trust-based values to guide the various dimensions of your work: www.trustbasedphilanthropy.org/resources-articles/tbp-in-4d
-  Join the Trust-Based Philanthropy Peer Exchange to connect with other funders that are actively practicing and deepening their trust-based practice: www.trustbasedphilanthropy.org/peer-exchange
-  Invite other colleagues and your board to fill out the self-reflection tool and see how your answers compare.
-  Identify one or two concrete areas that you can realistically improve upon in the next 6-12 months.
-  Revisit, clarify, and/or define your organizational values, and make sure there is shared understanding of definitions internally.
-  If your organization has a strategic plan, consider incorporating Culture, Structures, Leadership, and Practices more intentionally into your overarching strategy.