



Trust-Based Philanthropy Self-Reflection Tool

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 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 have 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 to indicate the frequency and depth with which 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 are lining up, noting areas that might need greater attention.
- 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. Notice where a question challenges you and consider where that may come from. This tool is an opportunity to get curious.

RANKING SCALE: **5** STRONGLY AGREE | **4** AGREE | **3** NEITHER AGREE NOR DISAGREE | **2** DISAGREE | **1** STRONGLY DISAGREE | **N/A**

PRACTICE

Every foundation’s trust-based practice will look different based on your unique goals, needs, and challenges. These general principles 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 are transparent with prospective and current grantees about our grantmaking priorities and decisions.
- 5) Our grant application process requires less time and effort than the average process.
- 6) We 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 reporting, we only request the information we need from grantees.
- 9) We carefully read everything that grantees send to us.
- 10) We respond 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.”
(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 _____

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 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 _____

“BOARD LEADERSHIP” AVERAGE 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 _____

“EXECUTIVE LEADERSHIP” AVERAGE SCORE _____



CULTURE

A practice of trust-based philanthropy begins with organizational culture – both internally among staff members and externally with grantee partners.

- 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) Our staff and board are committed to understanding how the philanthropy sector has historically contributed to and benefited from systemic inequities.
- 5) We understand how the issues we seek to address are both positioned within and continually shaped by systemic inequities.
- 6) We are open to new possibilities and transformation, even when they are difficult or have potential risks.
- 7) We acknowledge and respect grantees partners as experts in their work.
- 8) We intentionally create time for grantee partners to open up to us about their needs and challenges.
- 9) Our approach to evaluation is focused on learning and growth rather than on holding grantee partners accountable to impact metrics.
- 10) We seek feedback from grantee partners and community members before instituting policy or practice changes.

TOTAL _____

“CULTURE” AVERAGE 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 _____

“VALUES” AVERAGE SCORE _____



REFLECTION

- 1) Has there been growth or change around these four areas over the last 6-12 months? **Y N** What factors contributed to that change (or lack thereof)? _____
- 2) Did the prompts raise any new questions or insights about your organization as a whole? **Y N**
- 3) Which of the four areas had higher scores? _____ Which had lower scores? _____
- 4) Was there anything interesting or unexpected about how your scores turned out?





Any areas with less consensus? _____ Any contradictions? _____
- 5) Of the sections that ranked lower, where can you make some realistic changes or adjustments?

- 6) Of the sections that ranked higher, where can you extend the horizon for your practice?

- 7) 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 compare.
-  Identify one or two concrete areas that you can realistically improve upon in the next 6-12 months.
-  Consider incorporating Values, Culture, Leadership, and Practice more intentionally so that it becomes grounded in your overarching strategic plan.

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. Visit: www.trustbasedphilanthropy.org
- Join the Trust-Based Philanthropy Peer Exchange to connect with other funders that are actively practicing and deepening their trust-based practice. Learn more at <https://trustbasedphilanthropy.org/community-agreements>

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

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

- 2) What obstacles do you anticipate?

- 3) What steps can you take to address these challenges?

- 4) When would you like to reflect on your trust-based progress again? _____ (Schedule into your calendar)