ROADMAP TO TRUST-BASED TRANSFORMATION

Key milestones on the trust-based philanthropy journey

While the exact pathways for becoming a trust-based foundation are not necessarily linear or identical across organizations, there are common milestones to consider along any trust-based philanthropy (TBP) journey. This is a snapshot of some of those key milestones and how they connect to your organizational culture, structures, leadership, and practices. As you embark on the journey – and regardless of how far along you may be – you will find that much of this work is iterative, requiring continual learning and refinement.

**Awareness**
- Board and staff learn what it means to be a trust-based organization.
- Board and senior leaders agree on core values – and commit to implementing TBP practices and values across the organization.

**Assessment**
- Key staff review and assess org strategy, structures, protocols, and policies to ensure that they express trust-based values and reflect the mission.
- Senior leaders examine and repair the ways structural racism shows up in any structures.
- Staff, grantee partners, and vendors are invited to provide feedback.

**Institutional Transformation**
- Clarify key areas of transformation; establish internal team; create a realistic timeline.
- (Re)formulate foundation’s strategy with a lens of community accountability.
- Develop clear comms about expected shifts and how they reinforce equity & accountability.
- Use core values to determine how different departments will align on goals.
- Keep board & staff engaged, encourage co-ownership.

**Operationalize TBP Practices**
- Implement new policies and procedures (GMS, job descriptions, evaluation systems, contracting, etc.)
- Design feedback loops with stakeholders to inform iterative change.
- Operational changes start to reflect TBP values.

**Learn, Evaluate, Reflect**
- Shift data systems to prioritize self-reflection, emergent learning, and accountability to grantee partners.
- Encourage ongoing learning discussions among board, staff, and grantee partners.
- Talk less and listen more.

**Re-Evaluate**
- Use the TBP Self-Reflection Tool to re-assess grantmaking practices, culture, structures, and leadership against your values and make adjustments.

**Peer Networking & Advocacy**
- Staff and board reflect and share knowledge and learnings with peers committed to TBP.
- Staff and board become informed advocates for TBP.

Special thanks to Mynor Veliz and Headwaters Foundation for conceptualizing this roadmap. This is a high-level map rather than a comprehensive step-by-step guide. For more specific tools that align with your priority milestones, visit: www.trustbasedphilanthropy.org/resources