Trust-based philanthropy encourages funders to see their role as collaborators, learners, and co-conspirators in the success of grantee partners. In the context of the trust-based practice of doing the homework, this means intentionally sharing power and taking on some of the burdens that are typically imposed upon nonprofits.

This includes approaching relationships in the spirit of solidarity, respecting the time and expertise of nonprofits, being proactive about getting to know prospective grantees, keeping up with current grantees’ work, and studying the broader ecosystem within which you fund. Embracing this ethos can help foster more trust-based relationships, strengthen your understanding of the funding landscape, and will free up nonprofits to focus on their mission-critical work.

Doing the homework is an ongoing practice. Consider the following ways to be more mindful and respectful of nonprofits’ time and energy throughout the grantmaking process:

**ESTABLISH PURPOSE & CLARITY in Your Grant Decision-Making**

Your ability to foster good productive relationships with grantee partners begins with you getting super clear about your grantmaking priorities, eligibility, and decision-making criteria.

- **Review your grantmaking eligibility criteria.** Be very clear internally about the purpose, strategy and characteristics of possible grantee partners. The clearer this is, the more transparent decisions can be.

- **Revise your overall process using an equity lens.** Consider whether certain requirements or assumptions may be favoring organizations with more access to resources than others. Consider ways your grantmaking can be directed toward where resources are most needed.

- **Be transparent about how you make grant decisions,** who is eligible, how you do your homework to identify prospective grantees, and how organizations can approach you if they think their work may be a fit.

- **Be clear about who and what you do not fund,** to save the time of prospective ineligible applicants who might waste time on an application that will not go anywhere.

- **Share all of this information in a clear and consistent way** – on your website, in your communications, during public conversations, etc. where it is easily accessible.

“Doing the homework] is a reminder that the onus is on us to understand the organizations and how they might fit with our interests. With the variety of applications we receive, we’re even more mindful of that responsibility...Doing the homework, or taking primary responsibility for it, and spending time with the organization is the beginning of building a relationship – whether we move forward or not – and gives them cues about our values and approach to grantmaking.”

– Phil Li, President & CEO

*Robert Sterling Clark Foundation, New York*

www.trustbasedphilanthropy.org
Part of a funder’s job is to stay informed about developments and efforts related to the place or issue area your funding focuses on, and to be aware of the range of efforts that could benefit from your support.

• **Ask peers and colleagues** and, look beyond your usual circles and outside of the philanthropy world, to learn about organizations that are aligned with your foundation’s values and vision.

• **Get out in the community** and get to know organizations and people working on issues and topics that are important to your foundation.

• **Keep yourself informed** by attending community events, signing up for newsletters, setting Google alerts, participating in webinars, and reading the latest research related to the issues you fund.

“We work in a small state where it’s relatively easy to learn about good work being done by nonprofits. We listen during all of our meetings, conferences, and conversations for the organizations that keep coming up as influential and collaborative. We [then] reach out to get to know [those organizations] before they have to reach out to us... If [we know] we aren’t going to be the right fit for a partner, we do our homework on what funding organizations may be.”

– Beth Collins, Executive Director  
Sisters of St. Joseph Health and Wellness Foundation, West Virginia

**BE MINDFUL OF IMPLICIT BIAS**

We are all susceptible to implicit bias, which is defined as a bias or prejudice that is present but not consciously held or recognized. To minimize your implicit bias as you do the homework, consider incorporating the following practices:

• Recognize and acknowledge that you cannot achieve objectivity on your own and seek out ways to incorporate diverse perspectives

• Incorporate mechanisms in your organization’s structure to reduce implicit bias, e.g. develop a process to have people representing multiple perspectives read and evaluate grant applications

• It’s so hard to know what you don’t know! Evaluate your practices regularly to determine where your implicit bias might be influencing your work

**TAKE A RELATIONAL APPROACH** When Assessing Prospective Grantees

The get-to-know you stage can often be the most nerve-wracking and uncertain for nonprofits. Doing the homework in these early vetting stages can be a significant way to reduce the burdens and stress on nonprofits, while also demonstrating respect for their time.

• **Observe the organization in action** by attending their events, following them on social media, and reading their newsletters and reports.

• **Review publicly available information.** Review websites to understand the organization’s purpose, programs, and leadership. Use publicly available 990s to better understand how you can support your grant partners’ financial health. Explore platforms such as Candid or Charity Navigator as additional sources of information.

• **Invite a conversation when you are ready to learn more.** While power dynamics are always present, you can alleviate this by being transparent about your intentions and offering them the option of picking a meeting time/place that is most convenient for them. Approach your conversation with humility and curiosity, and be clear about where you stand in your funding decision-making process.

• **Consider compensating prospective grantees** during the relationship-building phase, especially if you require a lot more time to get to know them in order to make a funding decision.
DO THE HOMEWORK to Stay Apprised of Current Grantees’ Progress

There are many ways to keep up with grantees’ work without requiring bespoke reports. Consider the following strategies to stay apprised of their progress while better preparing yourself to have strategic big picture conversations about their hopes and needs.

• **Keep up with partners’ day-to-day work** by following them on social media, subscribing to their newsletters, and attending their events and webinars. Set up Google alerts to catch any mentions in the press.

• **Review their publications.** Many nonprofits document their learnings in the form of blog posts, annual reports, or videos. Stay apprised by regularly reviewing these materials and be ready to share observations or questions next time you meet with your partner.

• **Check in with your partners.** As you follow grantees’ progress, you can reinforce your commitment to partnership by reaching out on occasion to invite a check-in conversation. You might do this in lieu of a yearly site visit or required written report. These can be open-ended conversations via Zoom or over coffee, e.g. Robert Sterling Clark Foundation’s CHAT model. These can be great opportunities to listen for ways you can support them in advancing their work.

“*The way I [do] the homework is by intentionally creating and nurturing relationships with organizations we currently don’t fund. I pay special attention to organizations that are typically marginalized in the philanthropic landscape like mainstream large agencies that are led by people of color as well as organizations that explicitly and intentionally serve communities of color. [I do this by] mentioning their [work] to other funders, following those agencies on social media as well as attending their events [which] is especially important if they are not able to meet [in person] for us to get to know each other.*”

– Grace Pesch, Vice President of Community Impact
United Way of Olmsted County, Minnesota

BE MINDFUL OF POTENTIALLY EXTRACTIVE BEHAVIOR

Extrative behavior occurs when a person with power expects information, time, or knowledge from another party without acknowledging or valuing the labor it requires. In the funder-nonprofit relationship, the following behaviors can be considered extractive:

• Requesting numerous meetings or site visits before considering a proposal

• Requiring prospective grantees to “pitch” the board or grants committee

• Asking for multiple resubmissions of proposals or reports without explanation

• Expecting nonprofits to inform funder strategies without compensation

• Forcing collaborations without adequate funding, support, or feedback loops

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