



# 2023 GRANTMAKER SURVEY REPORT

*Analysis of responses from 396 grantmakers  
at various points in the trust-based philanthropy journey*



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## ACKNOWLEDGMENTS

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*Thanks to the hundreds of grantmaking practitioners who completed our survey, and our many partner organizations who helped disseminate the survey to their networks.*



## EXECUTIVE SUMMARY

Since before the inception of the Trust-Based Philanthropy Project (the Project), we've relied on a culture of learning to continuously inform our work. The importance of this commitment came into sharper focus within the first several months of our launch in 2020, when many in philanthropy were moved to reexamine their practices in light of a global pandemic and racial reckoning.

Since then, our team has paid close attention to how philanthropy has been evolving. Through post-webinar surveys, conversations with philanthropic serving organizations, nonprofit focus groups, discourse analysis, and an annual grantmaker survey, we are committed to learning as a strategy for remaining responsive to opportunities for trust-based transformation.

This report analyzes data from our second annual grantmaker survey conducted in early 2023. Our goals were to assess how practitioners are understanding and practicing trust-based philanthropy, what organizational changes have occurred since 2020, and what factors have been most useful in contributing to organizational change. Based on an analysis of 396 responses, we observed the following:

- **Funders who practice trust-based philanthropy are motivated by a belief that it is inherently more impactful, effective, and equitable than traditional philanthropy.** Many have been motivated by prior experience in the nonprofit sector and a belief that this approach is simply “the right thing to do.”
- **The majority of respondents made and sustained trust-based changes since 2020, but the results are uneven across various practices.** The highest ranked changes were streamlined applications and reports (90%), unrestricted grants (71%), and support beyond the check (71%). The lowest ranked changes were verbal reporting (51%) and multi-year grants (47%).
- **There is progress being made toward a trust-based learning and evaluation framework.** Fifty-two percent of respondents agreed and 33% somewhat agreed they already practice or are in the process of implementing trust-based learning and evaluation practices.
- **There are still barriers to implementing trust-based philanthropy holistically, even among highly engaged practitioners.** The most frequently cited barriers were skepticism/resistance from boards, capacity/time limitations, and lack of clarity regarding the nuances of trust-based philanthropy.
- **Exposure to new ideas via the Trust-Based Philanthropy Project and other philanthropic serving organizations was cited as the #1 contributing factor in inspiring organizational change (75%).** The next highest ranked factor was feedback from grantees (60%).

While it is heartening to see this evidence of a growing movement toward trust-based philanthropy, we are aware that this data set is mostly reflective of the experiences of grantmakers who have had some level of engagement with the Project and/or our partners. Moreover, this is self-reported data; thus, we cannot assume that it is necessarily reflective of the experiences of nonprofits who are on the receiving end of these relationships. Nonetheless, this data is a promising indicator of forward momentum. We are grateful to the hundreds of grantmaking professionals who took the time and care to respond to our survey, and who continue along the trust-based journey. These insights remind us that trust-based philanthropy is an ongoing journey, and that the work we are doing is needed, useful, and deeply desired.

With trust and gratitude,

A handwritten signature in cursive script that reads "Shaady Salehi".

Shaady Salehi  
Executive Director



# OVERVIEW

In January 2023, the Trust-Based Philanthropy Project conducted its second annual grantmaker survey to learn how grantmaking practitioners are building and engaging with the trust-based philanthropy movement. The purpose of this comprehensive annual survey is to understand how the philanthropic sector views trust-based philanthropy, and to what extent it is being explored, practiced, and embodied.

Four learning objectives helped guide the survey design, analysis, and report:

- To assess the shifts that have occurred within grantmaking organizations since the inception of the Trust-Based Philanthropy Project in 2020
- To gain a deeper understanding of fieldwide perceptions of trust-based philanthropy
- To gauge how grantmaking practitioners are employing a trust-based philanthropy framework
- To understand the obstacles to embracing and/or operationalizing trust-based philanthropy

This report covers three key areas of insight surfaced from 396 respondents:

- Personal motivations for pursuing trust-based philanthropy
- Reported shifts toward trust-based philanthropy
- Contributing factors that have supported organizational change

## Methodology

The survey was developed internally by the Trust-Based Philanthropy Project staff. This 22-question survey<sup>1</sup> utilized a mixed methods approach to collect qualitative and quantitative data. The survey was distributed and promoted through the Project's email newsletter, peer exchange listserv, and social media accounts. Several philanthropic serving organizations that had previously partnered with the Project on programming also promoted the survey to their members via their newsletters and social media accounts. A raffle for an organizational consultation was offered as incentive for survey participation.

***A note on self-selection bias:*** The majority of those who responded to this survey have had some level of engagement with the Trust-Based Philanthropy Project's activities, so this data is not intended to be representative of the entire philanthropy ecosystem. These reflections come primarily from those who are actively attempting to embrace and adopt trust-based values, practices, and culture.

<sup>1</sup> See Appendix B for the full list of survey questions.

## Breakdown of Survey Respondents

*This report is based on responses from 396 individuals<sup>2</sup> who work at grantmaking organizations.*

### Professional Roles

Participants were asked to self-select one option that best described their role in their organization. Thirty-seven percent identified as Program Staff, 31% as Executive Staff, 14% work in Grants Management, and 7% in Learning/Evaluation. Each of the other categories made up less than 5% of the responses.

### Geographic Representation

The majority of respondents (90%) were located in the United States, with the highest representation on the West Coast (29%) and East Coast (26%). It should be noted that some funders work remotely and might not be working in the same geographic location as their organization.

### Organization Types

Respondents were asked to identify the category that best described their organization based on the following options: community foundation, corporate foundation, donor circle, family foundation, individual donor/DAF, intermediary grantmaking organization, pooled fund, or private foundation. The highest representation was from family foundations (27%), followed by private foundations (24%) and community foundations (14%).

### Levels of Engagement with Trust-Based Philanthropy

An overwhelming majority of respondents identified as being somewhere along the trust-based philanthropy journey, with the largest proportion (55%) claiming to be at the “mid-stage”. See below for the full breakdown and definitions for each level of engagement:

#### **Q10: Where on the trust-based journey is your organization, currently?**

- **Fully Trust-Based: 10%** practicing [all six of the practices](#) and committed to [structures](#), [culture](#), and [leadership](#) embodying trust-based values
- **Mid-Stage: 55%** practicing many of the six practices and working on how to be more trust-based in structures, culture, and leadership
- **Early Stage: 25%** practicing one or two of trust-based practices and considering implementing more in the future
- **Exploring: 8%** having discussions about embracing trust-based practices and are hoping to move in that direction in the near future
- **Not Yet on the Journey: 2%** organizations that are not yet ready to embrace trust-based philanthropy

<sup>2</sup> A full breakdown of participant demographics can be found in Appendix A.



# PERSONAL MOTIVATIONS

## for Pursuing Trust-Based Philanthropy

The vast majority of respondents reported progression along the trust-based philanthropy journey, having implemented shifts to a more trust-based approach in their values, practices, and general priorities.

Most participants (82%) who completed the survey reported being actively (51%) or fully engaged (31%) with the trust-based philanthropy framework. When asked why they were motivated to pursue this approach, **funders named these top four reasons:**

- A core value that philanthropy should be harnessed as a tool to create a more equitable society
- A conviction that philanthropy will be more effective and impactful if it centers the needs and priorities of grantees and communities
- Empathy and understanding from previous experiences working in the nonprofit sector
- A fundamental belief that trust-based philanthropy is simply “the right thing to do”

### Advancing Systemic Equity

One of the most widely expressed motivations among survey respondents was the belief that philanthropy should be harnessed as a tool to create a more equitable society. [Similar to last year’s survey results](#), funders see trust-based philanthropy as an effective strategy to carry out racial and systemic equity goals.



*“As a Black woman, born in the South and now living and working in the South, I understand that funding is the difference between life and death for organizations and communities of color. As a philanthropist, this belief compels me to act accordingly. Responsive philanthropy shortens the turnaround so that more resources arrive more quickly to under-resourced communities and people in need.”*

**Program Staff, Intermediary Grantmaking Org, South**

### More Effective & Impactful Philanthropy

Survey respondents also reported that they are motivated by evidence that centering grantee needs is inherently more effective in advancing social change. Several respondents reinforced that building trusting relationships, listening to grantees, and freeing up grantees to focus on their mission-critical work is a more efficient and strategic approach to philanthropy – and that it will ultimately contribute to more meaningful and sustainable impact.



*“In my experience, [trust-based philanthropy] is more effective for both grantmakers and nonprofits in leading to impact ... It’s important for having healthy, transparent relationships in which nonprofits and other change organizations can own their own work and pivot as needed. It creates an environment where organizations can be honest about their work, [their] challenges, and successes – which in turn allows grantmakers to better understand and support those organizations.”*

**Executive, Family Foundation, East Coast**

## Prior Nonprofit Experience

More than two dozen respondents shared that their past experience working at nonprofit organizations has motivated them to advance trust-based philanthropy. These funders have firsthand experience with the stresses, anxieties, and harms of being on the grantee side of funder-driven power dynamics, which has produced empathy and understanding regarding the arduous burden for grantees. For many, trust-based philanthropy is a tool to break the cycle of burdensome practices often exercised by grantmakers.



*“I spent many years as a grant recipient and know how much time and effort it takes for applicants to work through each stage of the grant process. Now that I work [as a grantmaker], I feel even more determined to challenge our traditional approaches to grantmaking, which are steeped in colonialism, power and control ... We need to bring more awareness and intention to the work we are doing, questioning why we do things a certain way, and actively listening, learning, and dismantling systems that do harm (and that we have adopted unthinkingly), in service of a more just and equitable world.”*

**Executive, Government Funder, Canada**

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## Doing the Right Thing

When funders explained their motivations for practicing trust-based philanthropy, at least 10% of participants mentioned in their open-ended responses that it is simply “the right thing to do.” For many respondents, there seems to be a gut-level awareness of the inherent power imbalances in the philanthropic sector, and that trust-based philanthropy is an opportunity to redistribute power toward advancing the greater good.



*“It's the right thing to do! A year ago when I joined my foundation from a different field, I had a “freakout” moment when I came to terms with the institution/sector I was joining (doesn't philanthropy go against so much of what I'm trying to change in the world??) However, when I got to the foundation and started understanding the shifts it was trying to make, it seemed like TBP was a really good fit and a way to push ourselves to the next level.”*

**Program Staff, Community Foundation, West Coast**

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# REPORTED SHIFTS

## Toward Trust-Based Philanthropy

### What Changes Have Funders Made and Sustained?

The events of 2020 – particularly the COVID-19 pandemic and the racial justice uprisings – prompted many grantmaking organizations to reexamine their practices to be more flexible and responsive to communities’ needs. In fact, 87% of survey respondents reported that their organizations had taken steps to embrace and/or deepen their commitment to trust-based philanthropy since 2020.

When asked which specific changes they had made and sustained, the highest reported change was streamlining applications and reporting (90%), followed by increasing the number of unrestricted grants (71%) and instituting more support beyond the check (71%).

#### **Q13: Which of the following actions, if any, has your organization taken and sustained since 2020? Check all that apply.**

- **90%** *streamlined applications and/or reporting processes*
- **71%** *introduced and/or increased the number of unrestricted grants*
- **71%** *instituted more support beyond the check*
- **66%** *took steps to do the homework on prospective grantees in pre-proposal phases*
- **55%** *introduced systems and structures to identify overlooked and/or underfunded organizations*
- **51%** *implemented verbal reporting*
- **47%** *introduced and/or increased the number of multi-year grants*
- **17%** *took other actions*

### The Six Key Practices of Trust-Based Philanthropy:



**Give Multi-Year, Unrestricted Funding**



**Do the Homework**



**Simplify & Streamline Paperwork**



**Be Transparent & Responsive**



**Solicit and Act on Feedback**



**Offer Support Beyond the Check**

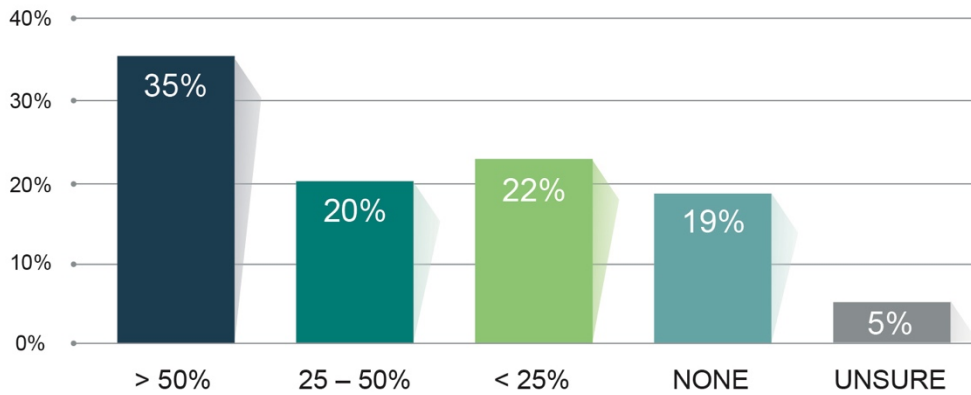




## Give Multi-Year, Unrestricted Funding

While 71% of survey participants introduced or increased their unrestricted funding, only 47% reported moving toward more *multi-year* grantmaking. Just 35% of respondents reported that the majority of their grantmaking was both unrestricted and multi-year. While this is a 5% increase from last year's survey data, it is clear that **implementing both multi-year and unrestricted funding remains a challenge – even for grantmakers who are highly engaged with trust-based philanthropy.**

### How much of your funding is currently unrestricted AND multi-year?



The rationale for the challenges of adopting multi-year funding varies based on the type of funding institution. For example, community foundation practitioners point to the fact that their reliance on fundraising and donor-advised funds gives them less agency in how they implement practices.

“ As a community foundation that actively fundraises each year's budget, it has been hard to institute multi-year practice. This year, well over 50% of our fundraised grantmaking will be multi-year, for the first time. The other side of our foundation, private DAF giving, eclipses our grantmaking and far less than 25% is explicitly multi-year. We are thinking through ways to change that.”

**Executive**, Community Foundation, East Coast

For other foundations, resistance from boards is a commonly reported barrier to embracing multi-year funding. This is often connected to board concerns about protecting the endowment and having more decision-making control over annual payouts.

“ We do not make multi-year grants. We piloted multi-year grants for one year and the trustees did not like the obligation to payout the next year. They prefer to decide year to year on the dollar amount of a grant. We do make unrestricted grants.”

**Program Staff**, Family Foundation, Southeast

Despite unrestricted funding being more widely adopted than multi-year funding, by and large, **unrestricted funding is still only given to specific priority areas rather being the norm across grant portfolios.** Multiple respondents noted in the open-ended responses that they've implemented unrestricted funding within a particular program area, but that it is not an organization-wide policy.



## Do The Homework

The Trust-Based Philanthropy Project defines “doing the homework” as a strategy for funders to take on the onus of getting to know prospective grantees as well as following the work of existing grantees in non-extractive ways. Sixty-six percent of respondents reported that they have taken steps to do the homework on prospective grantees in pre-proposal phases.



## Simplify and Streamline Paperwork

Streamlining applications and paperwork was reported as the most widely implemented sustained change (90%). That said, **it seems that many of these shifts to simplify were limited to shortening applications and reporting forms rather than implementing alternative approaches** to narrative applications and reports. In fact, only about half (51%) of respondents reported implementing verbal reporting as an alternative to traditional reporting. This may be due to the challenges funders are grappling with around collecting information for boards and/or an overreliance on traditional formal reporting structures to capture and quantify impact.



## Be Transparent and Responsive

While being transparent and responsive has many expressions, in this context we wanted to assess shifts regarding organizations that have been historically underfunded. Fifty-five percent of respondents reported that they've made shifts in this realm, including being clearer and more proactive about communicating their funding priorities, to being more transparent about organizational challenges and decision-making processes.



## Solicit and Act on Feedback

Sixty-one percent of respondents reported having collected and acted on feedback from their grantee partners. Many who embraced this practice shared that it has significantly contributed to stronger relationships with their partners. Several respondents shared that they had gotten feedback from grantees affirming a deeper sense of trust toward them and their foundation. Moreover, funders who solicited feedback from grantees about their trust-based shifts reported receiving overwhelmingly positive responses, such as a sense of relief regarding the flexibility offered by unrestricted and multi-year funding and the time saved with less burdensome applications and reports.

*“ We carry out an anonymous annual survey of all partners where they have space to provide feedback. They appreciate the following aspects of our support: lack of judgment and their ability to share problems / challenges / what isn't going well with us as well as what IS going well; support for trainings and capacity building; opportunities to cross-learn with other partners; unrestricted grants; continued support for many years. They asked for more support in these areas: help to identify other similar donors and funders; more capacity building/training support; multi-year grants.”*

**Executive**, Intermediary Grantmaking Organization, Great Plains



## Offer Support Beyond the Check

Support beyond the check is defined as responsive, non-monetary support that uplifts and bolsters grantee partners and their organizations. Seventy-one percent of respondents reported making and sustaining shifts in this realm, from promoting grantees' work, to connecting grantees to other funders, to engaging in philanthropic advocacy.

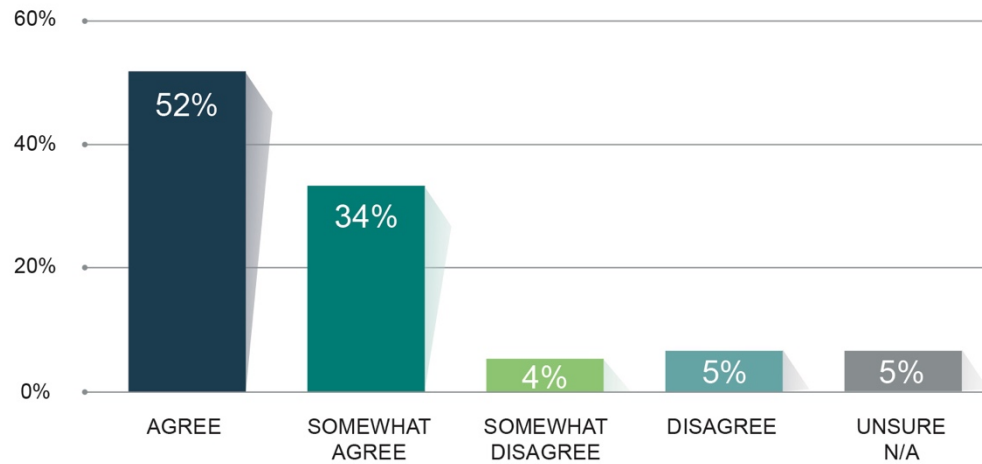
*“ [We have increased] the advocacy we do in the grantmaking space. In the past two years we have created goals for how many engagements each team member will participate in... These engagements must aim to... educate, discuss, workshop, or reflect on equitable/trust-based grantmaking. Another action [we've taken to provide support beyond the check] is ensuring our social media, website, messaging, etc. brings youth and partner voices to light, and also shifting policies about how and when we use images of community members so that they don't feel they need to give unlimited permission to use their likeness and image in perpetuity.”*

**Learning/Evaluation**, Private Foundation, Remote

## Other Shifts: Trust-Based Learning and Evaluation

Grantmakers are actively moving to explore and implement trust-based learning and evaluation frameworks.

**To what extent do you agree or disagree that your organization’s learning and evaluation embodies a trust-based approach?**



The vast majority (86%) of respondents said that they “agree” (52%) or “somewhat agree” (34%) that their organization’s learning and evaluation is rooted in mutual accountability and engages in dialogue to deepen understanding of their grantees’ work. **However, many organizations noted in their open-ended responses that this journey toward trust-based learning and evaluation is still a work in progress and that there is still more work to be done**, especially at the cultural and structural dimensions of their work.

In practice, many of the organizations that are actively shifting toward a trust-based learning model reported centering their grantee partners’ goals, engaging in dialogue-based approaches, and expanding their lens on ways to capture and document stories of grantees’ impact.



*“We center nonprofits’ definition of goals and how they will understand or measure their progress or success. With some small exceptions, there are no [requirements for] hard and fast metrics. We believe it is possible [to rely] on nonprofit/grantee expertise and community knowledge...to holistically understand progress and movement on topics/constructs in our catchment. We also can do our own exploration of population indicators of interest without constantly relying on grantees to report to a set of niche metrics that we’ve defined.”*

**Learning/Evaluation, Community Foundation, East Coast**

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## Top Barriers to Implementation

Despite efforts to shift to a learning stance, and to implement and sustain trust-based changes, many respondents are still experiencing barriers to fully operationalizing trust-based philanthropy. The top reported barriers included:

- **Board misalignment:** Respondents consistently noted resistance from boards as a major barrier to advancing organizational change. While some trustees are reportedly hesitant to changing current practices, some have concerns around the perceived lack of rigor and accountability in trust-based philanthropy.
- **Capacity and time:** Participants reported challenges with the time and capacity it takes to shift organizational practices, and the challenge of competing priorities and deadlines. On a more granular level, some respondents noted the challenges of making time and space to support the highly relational nature of trust-based grantmaking.
- **Lack of clarity and understanding:** The data showed that many practitioners who are working to advance trust-based philanthropy are challenged by their own lack of clarity and/or misperceptions from colleagues, especially regarding aspects of the approach that aren't clearly encapsulated in the six practices. While funders may have clarity around the practical tactics, the more nuanced cultural and structural elements are harder to grasp and operationalize.



*"I've encountered some misunderstandings of TBP among fellow staff and leadership, such as the idea that it's a "fad" or that it is something so general/vague that it could describe what we already do and have always done (e.g. "we have always trusted our grantees"). Another obstacle is around our organizational structure as a community foundation - there is a sense that we can't always implement TBP because of the type of funds and structure we have."*

**Program Staff**, Community Foundation, West Coast

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## Other Reported Barriers

Other common barriers to implementation include structural limitations with foundations' current systems of operation, or not having the right infrastructure in place to fully operationalize trust-based philanthropy. A lack of oversight and accountability was also noted, as funders attempt to implement these changes without direct explicit support. Some struggle with knowing exactly how to operationalize the work, noting that while the principles are clear, how to implement them is still obscure.

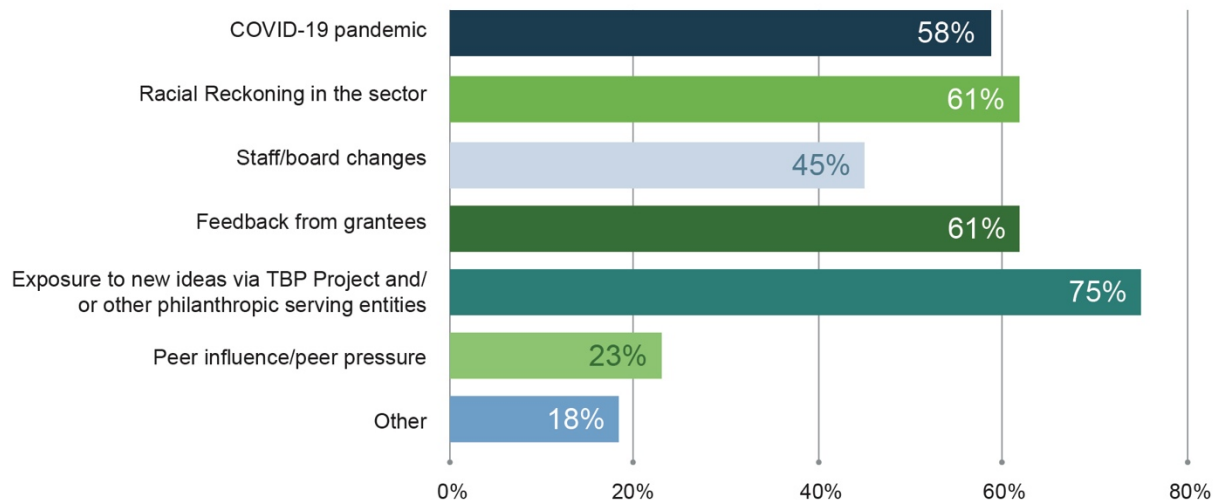


# CONTRIBUTING FACTORS

## Toward Trust-Based Changes

Societal and external occurrences, such as the COVID-19 pandemic and racial unrest, helped create the impetus for funders to make many of the reported shifts toward trust-based philanthropy. Other factors, such as staff/board transitions, internal advocacy, and grantee feedback were also noted as key contributors toward advancing change.

### Factors Attributed to Changes Made at Organizations



**Among these factors, 75% of respondents named** exposure to new ideas from the Trust-Based Philanthropy Project and other philanthropic-serving entities as a key factor in catalyzing the changes made at their organizations. This points to the value of an established framework and shared language, educational programming, and clearly articulated recommendations as a means for funders to understand and actively shift their practices and cultures.

Comparatively to the other listed factors, peer influence was reported as the least likely (23%) to influence organizational shifts. This data point is inconsistent for a sector that has historically leveraged [peer influence as a strategy](#), and for the Project itself, which was founded as a peer-to-peer initiative. In this case, the term “peer influence” seems to be interpreted in different ways, as the data does point to the respondents placing significant value on peer influence in adopting these practices. For example, exposure to trust-based philanthropy through the Project or other PSOs was named as a strong influencer; the desire for more case studies and peer examples; and the highly active peer listserv being listed as a top value. Funders are likely to move or be inspired by peer influence, without always acknowledging or defining it in this way.

## **Additional Evidence of Forward Momentum:**

### *Increased Engagement with Trust-Based Philanthropy Project Resources*

Since the Trust-Based Philanthropy Project's launch in 2020, there has been a steadily growing number of practitioners engaging with our programming, resources, and tools. For example:

- Traffic to the Trust-Based Philanthropy Project website has increased by nearly 50% since last year. So far in 2023, average monthly unique visitors are 8,995, compared to a monthly average of 6,100 in 2022.
- Monthly downloads of Trust-Based Philanthropy Project resources are currently at 2,167 – a 37% increase since last year.
- There has been a 69% increase in signups for the Project's email newsletter in the last 12 months. As of this writing, there are 6,699 subscribers to the email newsletter, compared to 3,942 this time last year.
- The Trust-Based Philanthropy Project's peer exchange has gained 782 members since it was created in March 2021.

As trust-based funders work to drive racial equity, deepen and strengthen relationships with grantee partners, and center the needs of nonprofit organizations, they continue to name a desire for additional resources from the Trust-Based Philanthropy Project. Specifically, funders are interested in case studies specific to various types of grantmaking institutions that have operationalized trust-based philanthropy.

The top-requested resources on trust-based philanthropy include:

- How organizations have been able to show impact with trust-based philanthropy
- How to overcome resistance to trust-based philanthropy
- How funders have listened to their grantees and how they changed practices as a result

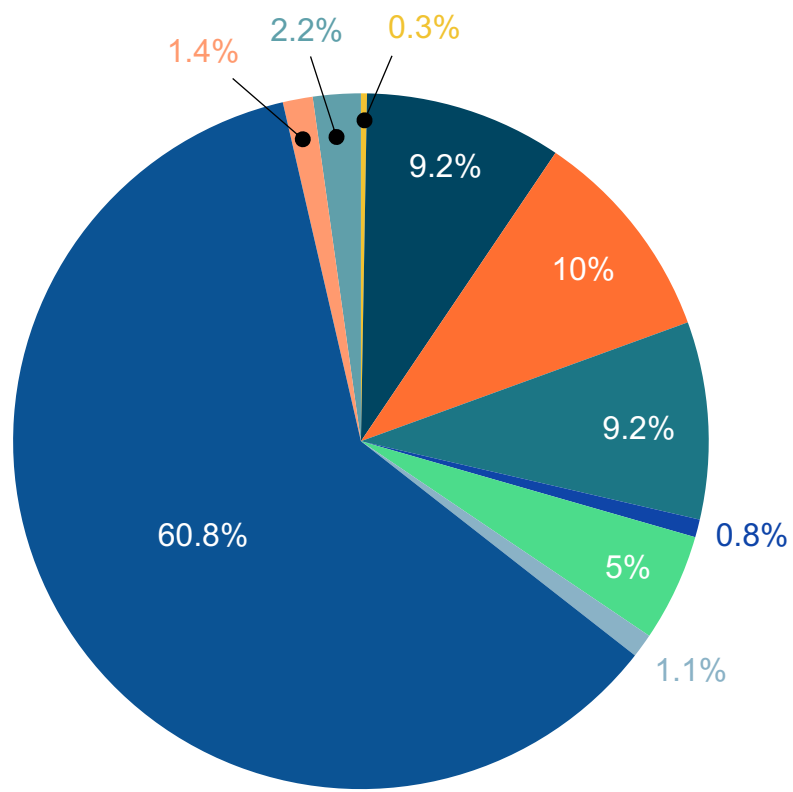
All of this makes it clear that the movement is strong and sustaining. From the most engaged trust-based advocates to those who are just starting their trust-based journeys, funders expressed interest and a desire to learn more from and continue engaging with the Project across all levels.

## **Conclusion: *Promising Momentum***

The learnings from our 2023 Grantmaker Survey indicate promising momentum around the adoption and pursuit of trust-based philanthropy in the United States and beyond. This is evident in the large proportion of participants who made and sustained changes in their grantmaking since 2020, the growing interest in advancing more trust-based learning practices, as well as the increasing number of practitioners engaging with the Trust-Based Philanthropy Project. Moreover, it is significant that many of those who have engaged with trust-based philanthropy are motivated by core values – especially the belief that shifting power to those who are closer to the issues will be inherently more impactful in addressing those very issues. This indicates an emergent cultural shift away from the sector's historical overreliance on top-down, foundation-led strategies for impact.

However, given that trust-based philanthropy is a holistic practice that requires a commitment to aligning values with organizational structures, culture, and leadership (in addition to practices), there is still more work to be done. The reported barriers to fully operationalizing trust-based philanthropy indicate that many foundations' cultures and structures are still rooted in conventional mindsets and assumptions. While mindset barriers may be harder and slower to shift than grantmaking practices, they are not insurmountable. The sector is evidently in a profound moment of cultural awareness that has already opened up the possibilities for change. We are optimistic about this forward momentum and look forward to supporting the field's ongoing learning and growth along this journey.

# Appendix A: Respondent Demographics

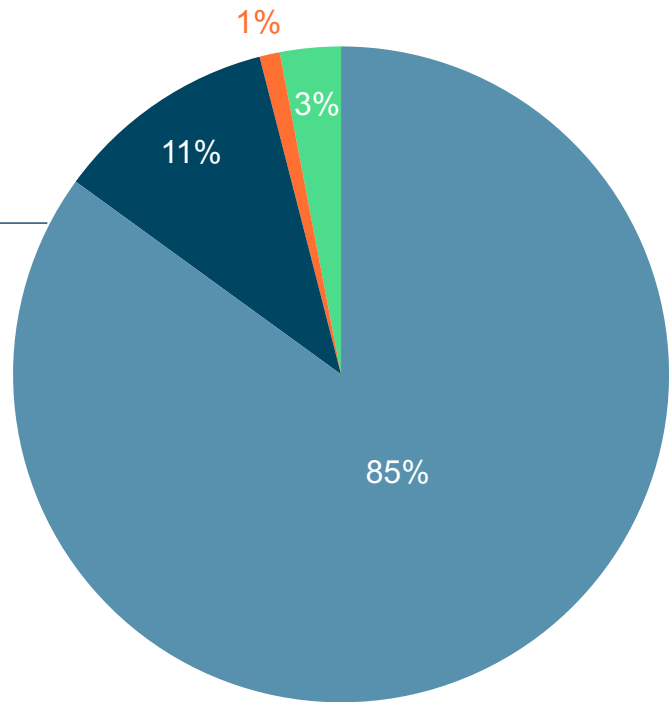


## RACE / ETHNICITY

- White – 60.8%
- Black or African American – 10%
- Latino/Hispanic – 9.2%
- Asian American and/or Pacific Islander – 9.2%
- Multiethnic or Multiracial – 5%
- Other – 2.2%
- Unknown or prefer not to answer – 1.4%
- Native American, American Indian, or Alaska Native – 1.1%
- Middle Eastern – 0.8%
- Arab or Arab American – 0.3%

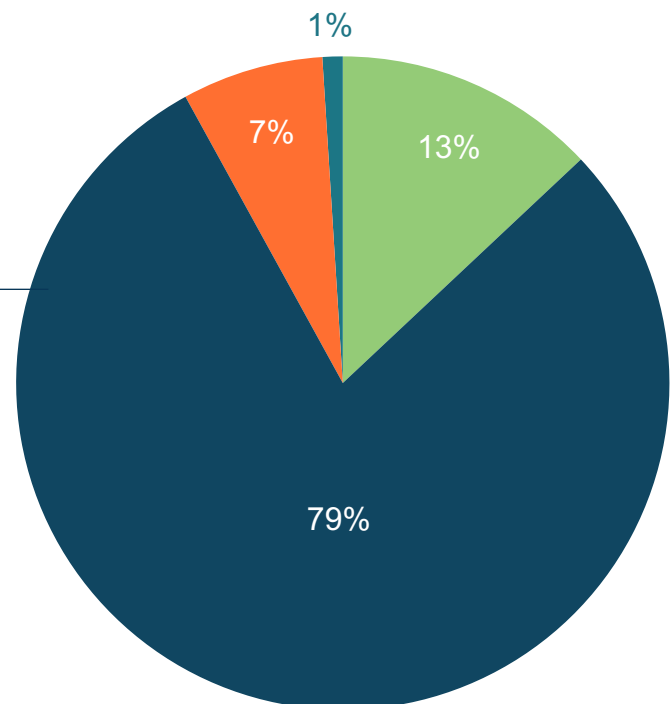
## GENDER IDENTITY

- Cis Woman – 85%
- Cis Man – 11%
- Prefer not to answer – 3%
- Gender non-conforming/non-binary – 1%
- Trans Man – 0%
- Trans Woman – 0%



## SEXUAL ORIENTATION

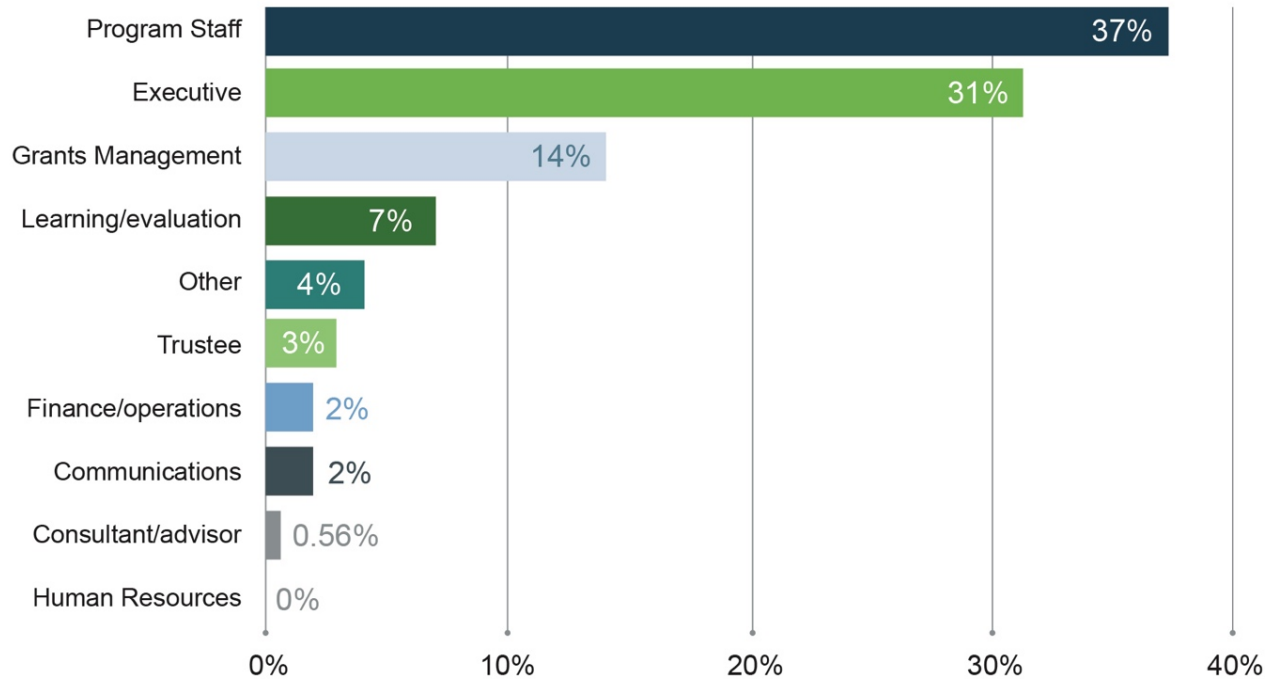
- Heterosexual – 79%
- Lesbian, gay, bisexual, pansexual, or queer – 13%
- Prefer not to answer – 7%
- Other sexual orientation – 1%





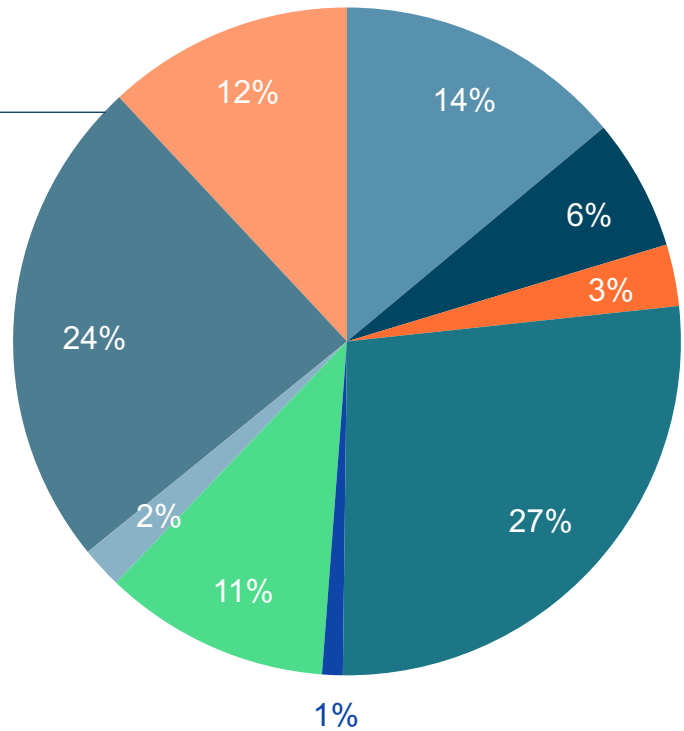
## PROFESSIONAL ROLE

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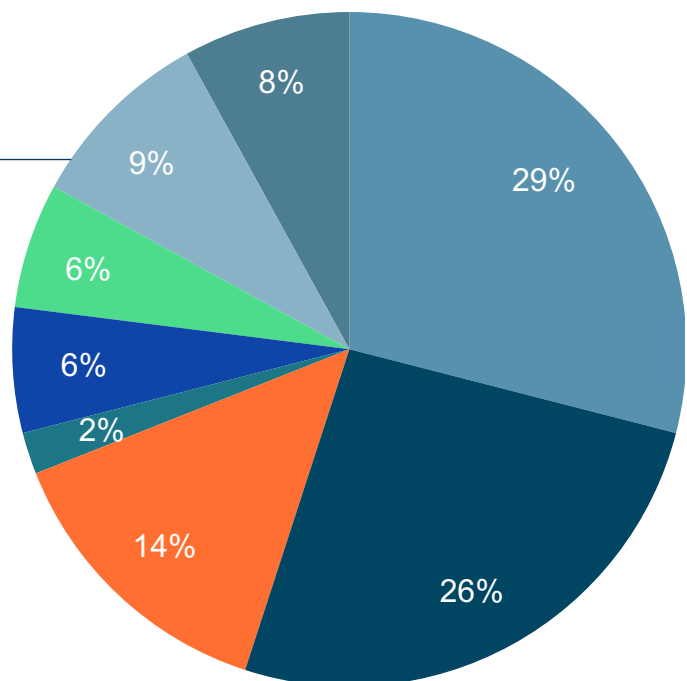
## ORGANIZATION TYPE

- Family Foundation – 27%
- Private Foundation – 24%
- Community Foundation – 14%
- Other – 12%
- Intermediary Grantmaking Org – 11%
- Corporate Foundation – 6%
- Donor Circle – 3%
- Pooled Fund – 2%
- Individual Donor/DAF holder – 1%



## GEOGRAPHIC LOCATION

- West Coast – 29%
- East Coast – 26%
- Midwest – 14%
- Outside the U.S. – 9%
- Other – 8%
- Southwest – 6%
- Southeast – 6%
- Great Plains states – 2%





## Appendix B: Survey Questions

**Thank you for participating in the Trust-Based Philanthropy Project’s 2023 annual grantmaker survey. Our goal this year is to assess changes that have occurred in the last several years, get a deeper understanding of field-wide perceptions, and gauge how practitioners are employing the trust-based philanthropy framework. We will use your feedback to inform our strategies, programming, and offerings over the next two years and beyond.**

**Please note that this survey is only intended for donors, grantmakers, and staff of grantmaking organizations. You are not required to limit responses to one person per organization; multiple responses per organization are acceptable.**

**This survey will be open through January 31, 2023 and should take 12-15 minutes to complete. Your responses will remain entirely anonymous. Thank you again for your time.**

\* 1. Do you work at a grantmaking institution?

- Yes
- No

\* 2. **Race/Ethnicity: Which of the following best describes how you identify?**

- Arab or Arab American
- Asian American and/or Pacific Islander
- Black or African American
- Latino/Hispanic
- Middle Eastern
- Multiethnic or Multiracial
- Native American, American Indian, or Alaska Native
- White
- Unknown or prefer not to answer
- Other (please specify)

**\* 3. Gender: Which of the following best describes how you identify?**

- Cis woman
- Cis man
- Gender non-conforming/non-binary
- Trans man
- Trans woman
- Prefer not to answer

**\* 4. Sexual orientation: Which of the following best describes how you identify?**

- Lesbian, gay, bisexual, pansexual, or queer
- Heterosexual
- Prefer not to answer
- Other sexual orientation (please specify)

**\* 5. Professional Role: Which of the following best describes your role within your organization?**

- Executive
- Trustee
- Program staff
- Finance/operations
- Communications
- Learning/evaluation
- Grants management
- HR
- Consultant/advisor
- Other (please specify)

**\* 6. Org Type: Which of the following categories best describes the type of grantmaking organization you represent?**

- Community foundation
- Corporate foundation
- Donor circle
- Family foundation
- Individual donor/DAF holder
- Intermediary grantmaking org
- Pooled fund
- Private foundation
- Other (please specify)

**\* 7. Geographic location: Which of the following regions best describes your location?\***

- West coast
- East coast
- Midwest
- Great Plains states
- Southwest
- Southeast
- Outside the US
- Other (please specify)

\* 8. **How engaged are you with trust-based philanthropy?\*** (Please select the option that feels MOST aligned)

- Fully engaged** (I'm all in; I am fully committed to embodying trust-based values in my work, and my organization is committed to the journey as well)
- Actively engaged** (I've advocated for shifts at my org, and I'm feeling the positive impacts of that. I realize it's a long road ahead but I feel committed to this approach as a core part of my work and role in philanthropy)
- Somewhat engaged** (I am familiar with what trust-based philanthropy is, have attended some informational presentations, and have been talking about it with my colleagues)
- Just getting started** (I'm curious about and exploring trust-based concepts, but haven't taken any steps to operationalize)
- Total newbie** (I only recently heard about it and I'm not sure yet how it fits into my work)
- Other (please specify)

9. What, if anything, personally motivates you to practice and/or explore trust-based philanthropy?

\* 10. **Where on the trust-based philanthropy journey is your organization, currently?**

- Fully trust-based** - we practice all six of the practices and are committed to our structures, culture, and leadership embodying trust-based values
- Mid-stage** - we practice many of the six practices and are working on how we can be more trust-based in our structures, culture, and leadership
- Early stage** - we practice one or two of trust-based practices and may consider implementing more in the future
- Exploring** - We are having discussions about embracing trust-based practices and are hoping to move in that direction in the near future
- Not yet on the journey** - My organization is not yet ready to embrace trust-based philanthropy

Is there any context you'd like to offer regarding your answer above?

**\* 11. How much of your funding is currently unrestricted AND multi-year?**

- More than 50%
- 25-50%
- Less than 25%
- None of our funding is currently multi-year and unrestricted
- Unsure

Is there any context you'd like to offer regarding your answer above?

**\* 12. Has your organization taken steps to embrace trust-based philanthropy and/or deepen your commitment to trust-based philanthropy since 2020?**

- Yes
- No
- Unsure/Not applicable

**\* 13. Which of the following actions, if any, has your organization taken and sustained since 2020? (Check all that apply)**

- |  |   |
|--|---|
| <input type="checkbox"/> Streamlined our application and/or reporting process          | <input type="checkbox"/> Took steps to "do the homework" on prospective grantees in the pre-proposal stages             |
| <input type="checkbox"/> Switched from narrative to verbal reporting                   | <input type="checkbox"/> Improved our systems and structures to identify underfunded and/or overlooked grantee partners |
| <input type="checkbox"/> Moved to multi-year grants                                    | <input type="checkbox"/> Instituted more support "beyond the check"   |
| <input type="checkbox"/> Introduced and/or increased the number of unrestricted grants | <input type="checkbox"/> We have taken other actions not reflected above  |

Is there any context you'd like to offer regarding your answer above?

**\* 14. What factors do you attribute to the changes that have been made at your organization?** (Check all that apply)

- |   |   |
|---|---|
| <input type="checkbox"/> COVID-19 pandemic              | <input type="checkbox"/> Feedback from grantees   |
| <input type="checkbox"/> Racial Reckoning in the sector | <input type="checkbox"/> Exposure to new ideas via Trust-Based Philanthropy Project and/or other philanthropic serving entity |
| <input type="checkbox"/> Staff/board changes            | <input type="checkbox"/> Peer influence/peer pressure   |
| <input type="checkbox"/> Other (please specify)         |   |

**15. What, if any, feedback have you received from your grantee partners as you've made shifts to your processes?**

\* 16. We define a trust-based board as a governing body of curious leaders who model humility and empathy, are open to feedback, strive to learn from and be accountable to the communities they serve, and place a high level of trust in their executive leadership and staff's decision-making. To what extent do you agree or disagree that this describes your organization?

- |   |   |
|---|---|
| <input type="radio"/> Agree             | <input type="radio"/> Disagree              |
| <input type="radio"/> Somewhat Agree    | <input type="radio"/> Unsure/not applicable |
| <input type="radio"/> Somewhat Disagree |   |

Is there any context you'd like to offer regarding your answers above?



\* 17. A trust-based learning and evaluation framework is an approach rooted in mutual accountability and engaging in dialogue to deepen understanding of grantee partners' work (as opposed to relying on a fixed set of indicators as the primary indicator of success). To what extent do you agree or disagree that this describes your organization's learning and evaluation approach?

- Agree  Disagree  
 Somewhat Agree  Unsure/not applicable  
 Somewhat Disagree

Is there any context you'd like to offer regarding your answers above?

18. Have you experienced any notable challenges or obstacles with regards to understanding, operationalizing, and/or advocating for trust-based philanthropy? Your response will help us clarify future programming or tools that we can develop to support the field's needs.

**19. Which of the following offerings from the Trust-Based Philanthropy Project have been particularly useful to you and your organization's journey? (Check all that apply)**

- Webinars  
 Peer listserv  
 TBP in 4D  
 Self-Reflection Tool  
 Templates  
 Stories on the TBP Website  
 Newsletter  
 Social Media (LinkedIn/Twitter)  
 Other (please specify)

**20. In the coming year, we will be developing case studies about organizational transformation. How likely are you to reference those?**

Very Likely	Likely	Unlikely	Very Unlikely	Unsure/ not applicable
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you answered Very Likely or Likely, what would you specifically like to see in those case studies?

**21. Are there other resources or tools that would be helpful in supporting you and/or your organization's trust-based philanthropy journey?**

**22. Do you have any other comments or questions for the Trust-Based Philanthropy Project?**

23. Thank you for taking the time to complete our survey. If you would like to enter to win a free trust-based philanthropy consultation , please enter your email address below. We will randomly select five people.