

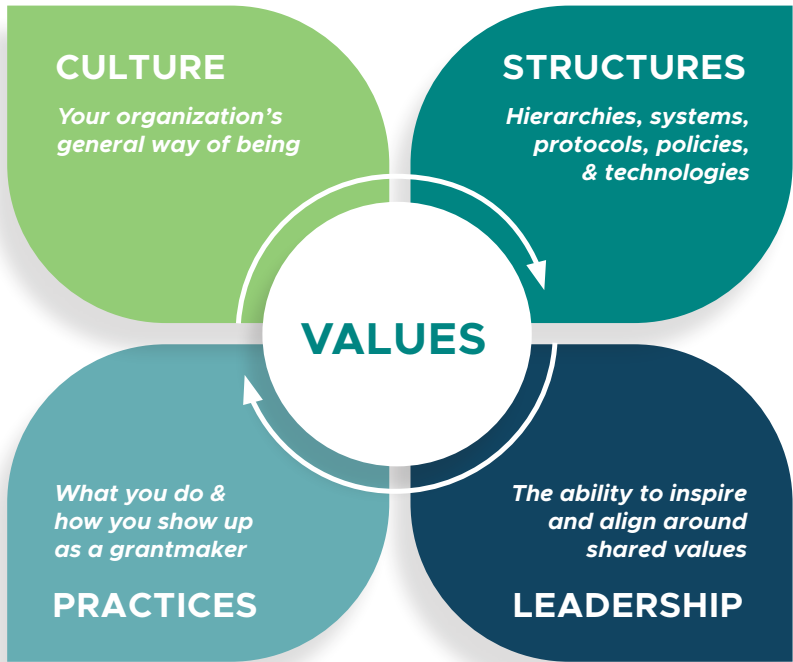


TRUST-BASED PHILANTHROPY IN 4D

USING TRUST-BASED VALUES TO GUIDE YOUR PHILANTHROPY'S CULTURE, STRUCTURES, LEADERSHIP, & PRACTICES

Trust-based philanthropy flips the script on traditional philanthropy. With a core set of values rooted in advancing equity, shifting power, and building mutually accountable relationships, trust-based philanthropy seeks to demonstrate humility and collaboration in what we do and how we show up in all aspects of our work as grantmakers.

While trust-based philanthropy tends to be associated with a set of six grantmaking practices, a fully trust-based approach invites practitioners to rely on trust-based values to guide four key dimensions of a grantmaking organization's work: *culture, structures, leadership, and practices.*



VALUES (n., pl.) : The fundamental beliefs that drive your organization's attitudes, priorities, and actions.

HOW TO USE THIS GUIDE:

This guide is intended for grantmaking practitioners who are ready to live into their values to cultivate trust-based philanthropy holistically, across the four dimensions of this work: *culture, structures, leadership, and grantmaking practices.* Use it as a discussion and reflection tool to bolster your strategic planning, self-evaluations, and staff and board conversations.



Offers clear steps for thinking through these 4 dimensions, while inviting inquiry to deepen trust-based values and actions.



Helps you identify areas of focus, opportunities to go deeper on themes you are already working on, and/or future aspirations for your organization.



Encourages you to seek out additional resources that meet your particular needs as you go along your trust-based journey.



A VALUES-BASED APPROACH

Trust-based philanthropy begins with a clearly articulated set of values that function as a north star for **DECISION-MAKING, CULTURE-SETTING, & SYSTEMS DESIGN**

WHY CLARIFY VALUES?

Being clear on values helps you make decisions through moments of uncertainty or change, guides your relationship-building with grantee partners, fosters internal alignment among your staff and board, and informs how you design your organizational systems and structures.

“We believe that the leadership of those most impacted by injustice will get us to justice. If that’s true, then shouldn’t we trust the people doing the work to know how to get us there?”

DIMPLE ABICHANDANI
GENERAL SERVICE
FOUNDATION

FIND YOUR STARTING POINT: HOW TRUST-BASED ARE YOUR VALUES?

- **If your organization does NOT have articulated values:** Take the time to reflect as a staff on what you stand for. What drives your work? What do you fundamentally believe in that you want your team to get behind? What is your process for creating and honing values? Who informs them, and why?
- **If your organization already has articulated values:** Revisit them with a trust-based lens. Do your articulated values acknowledge power, relationship, and accountability to the community? Do any of your articulated values unintentionally reinforce power imbalances, such as giving outsized importance to wealth over people? Are there any assumptions or biases implicit in your existing values statements?

TRUST-BASED VALUES

EXAMPLES FROM THE FIELD

Trust-based philanthropy acknowledges that we operate within an inequitable, white dominant system that has historically favored a small subset while oppressing and exploiting others.

Trust-based values are rooted in a commitment to redistributing power in service of a healthier and more equitable society. While there’s not a one-size-fits-all list of values, the following examples have been embraced by a range of trust-based funders:

- Work for systemic equity:** We must recognize the racial, economic, and political inequities in which we operate, and take an anti-racist approach to change practices and behaviors that perpetuate harm.
- Redistribute power:** Advancing impact requires us to share power with those who are closer to the issues we seek to address.
- Center relationships:** Prioritizing healthy, open, honest relationships can help us navigate the complexity of our work and our world with greater confidence and effectiveness.
- Partner in a spirit of service:** Our role is to be a supporter & collaborator to grantee partners. This requires us to lead with trust, respect, and humility.
- Be accountable:** Our work will only be successful if we hold ourselves accountable to those who we seek to support.
- Embrace learning:** The complexity of our work requires us to be open to learning as we go, and embrace opportunities for growth and evolution along the way.

THE 4 DIMENSIONS OF TBP

Once you clarify values with a trust-based lens, you have a strong basis from which to shape your organizational
CULTURE, STRUCTURES, LEADERSHIP, & PRACTICES

1 CULTURE

(n.) The expression of your values in your organization's norms, systems, and practices. Culture is your general "way of being."

Culture is often set as a "default," meaning there isn't necessarily intention or care dedicated to culture-building itself. In reality, culture is a constant element of organizational life, and has ramifications for your organizational structure, leadership, and grantmaking. Culture is everywhere, and can often be felt even when it is invisible or unspoken—from how safe staff feel showing up authentically in meetings, to the diversity of representation in an organization's leadership team.

"We have a cultural norm to encourage and celebrate unexpected emergence. If everything follows 'the plan,' we are controlling too much—it is a signal we are not reaching high enough."

SHRUTI JAYARAMAN
CHICAGO BEYOND

ORGANIZATIONAL CULTURE & RACE

The default culture in many institutions is white dominant. In this context, individualism, achievement, and perfection operate as baseline assumptions, with little acknowledgment of the structural inequities and sociocultural differences that are present for many people in the workforce. If this default culture goes unacknowledged, it can alienate those who are unable to assimilate, serve as a barrier to building internal trust, and perpetuate staff turnover. For this reason, a trust-based culture requires a commitment to antiracist and anti-bias work so that we can optimize opportunities for cooperation, community, and creativity among diverse staff with varying lived experiences.

If trust is not built internally, then it can never be fully realized externally. Ultimately, a trust-based culture is one wherein we center relationship-building and address inequitable power dynamics in every aspect of our work. This requires us to uncover biases and make space for dialogue, collaboration, transparency, and humility. This also means we must work intentionally and continuously to foster a sense of trust among trustees, senior leadership, staff, grantees, and community members.

STEPS YOU CAN TAKE

Culture requires constant cultivation. In a trust-based context, culture is strongest when everyone feels a sense of agency in shaping it. Some organizations may already have elements of trust-based culture, while others may be much earlier in the journey. The role of leadership is essential in upholding and reinforcing culture (see p.5).

- **Assess your current culture.** What are the assumptions about your work and approach? Does everyone have a sense of agency? What source materials support your thinking? What are the expectations of staff? Are there regular discussions about values? Are gatherings designed with power-sharing and inclusion? Identify any cultural practices that may be misaligned with trust-based values.
- **Normalize conversations about power and race.** Power imbalances are always present. Be sure to discuss how they intersect with race, age, gender identity, sexual orientation, (dis)ability, and immigration status. Be upfront about your organization's endowment, acknowledge the power imbalances within your staff structure, and name built-in biases in your mission statement. It's important that staff feel empowered to raise and address these imbalances.
- **Support continuous learning.** A learning mindset helps foster a sense of humility, growth, and dialogue. Encourage training opportunities for staff and host discussion groups about current events. Build in annual feedback from the community or conduct ongoing assessments of your organization's community engagement and trust-building efforts.
- **Create space for reflection and dialogue.** Foster a reflective culture by reserving part of team meetings for relationship-building, encouraging and honoring paid time off, and hosting restorative circles to repair challenged relationships.

2 STRUCTURES

(n., pl.) The hierarchies, systems, protocols, policies, standardized processes, and technologies of an organization. This includes compliance policies, HR handbooks, staff decision charts, investment policies, hiring practices, and grants management systems.

Structure is deeply connected to culture and values. If your organization's structures are not reflective of trust-based values, they are likely to become barriers to advancing trust-based grantmaking practices.

It is critical to examine and align your organizational structures so that they don't inadvertently reinforce top-down power dynamics among your various stakeholders—staff, board, grantee partners, vendors, contractors, etc.

It is particularly important to check for any structures that place outsized priority on your foundation's financial assets over the people you serve. This is perhaps the greatest indicator that your systems and structures are not lining up with trust-based values.

"We are restructuring the organization in an emergent way into a more decentralized, distributed leadership framework that gives all staff a leadership role within the org."

GABRIELA ALCALDE
ELMINA B. SEWALL FOUNDATION



"As part of our commitment to a strong learning culture, the foundation uses multiple platforms of learning, including annual feedback from our community and ongoing evaluation of the foundation's efforts."

JOHN BROTHERS
T. ROWE PRICE FOUNDATION

STEPS YOU CAN TAKE

- **Conduct an internal audit.** Review and assess your policies and procedures to ensure that they express your values and reflect the purpose of your mission. Take into account how structural racism has shown up in your grantmaking, leadership, internal policies and HR—and work toward revising them. Be sure to ask staff, vendors, and grantees for feedback on what's working and what's not.
- **Apply an antiracist, values-based lens to hiring practices.** Rather than focusing solely on applicants with graduate degrees and fancy job titles, root your hiring practices in values, competencies, and lived experience. Strive for leadership and staff representation that is reflective of the work you do and the communities you support.
- **Decentralize decision-making structures.** Design decision-making rubrics using collective input, establish grant committees that include community perspectives, and make sure decisions are informed by multiple stakeholders.
- **Apply a relational lens to grant management.** Are your grants management systems designed around grantee compliance and proving impact metrics? If so, they may be thwarting your team's ability to build transparent, trust-based relationships with grantee partners. Revisit your systems to allow for emergent learning, conversational reporting, and greater flexibility in outcome expectations.
- **Revisit and revise job descriptions and grant contracts.** Job descriptions and grant agreements can often unintentionally perpetuate top-down power dynamics. Consider how these documents can be updated to be less punitive and prescriptive, and more relational and learning-oriented.
- **Adopt emergent learning tools.** Many grantmaking organizations are focused on capturing predetermined impact metrics, which significantly limits how we learn about the work. Instead, build emergent learning into your systems and structures—either by adopting formal tools that guide your decisions, or by informally encouraging ongoing learning discussions among staff and grantee partners.

An organization's leadership team plays a key role in upholding and reinforcing values and culture—not just by what is said, but what is done. It is virtually impossible for organizations to embody a fully trust-based approach without buy-in and modeling from leadership.

Trust-based leaders are collaborative and facilitative. They prioritize the well-being and development of the humans doing the “work,” while keeping an eye on the big-picture organizational vision and purpose. They are focused on lifting up the whole team and building trust internally, rather than consolidating attention, power, and influence at the executive or trustee level. Most importantly, they lead by embodying values of humility, equity, and transparency—with a willingness to give up some of their power in service of the organization's greater purpose.

“We must recognize that we, as individuals within philanthropy, are awarded an incredible amount of unearned credibility and that this skews our perspectives, level of humility, and sense of authority.”

A. SPARKS
MASTO FOUNDATION

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“With my team, we have begun intentional conversations about agency: what causes them to have more, what I might be doing to undermine their sense of agency. Building these trusting relationships within the team have been key to our ability to embrace trust-based philanthropy.”

BRITTNEY GASPARI
THE WINSTON-SALEM FOUNDATION

STEPS YOU CAN TAKE

- **Be self-aware, listen, and be transparent.** Think critically about how you are showing up with staff, grantee partners, and the community. Consider how you have benefitted from regular access to power and privilege; how you may be unintentionally perpetuating power differentials or institutional racism. Be as transparent as possible in communications, plans, and assumptions—and don't shy away from admitting your mistakes. Be clear when there is room for input from others. Practice compassion and non-extractiveness.
- **Build a strong support system.** Leaders serve as trusted guides for organizations to navigate through change, uncertainty, and growth. In order to do this well, leaders need a strong support system, opportunities to cultivate purpose and restoration, and a commitment to continuous learning.
- **Acknowledge power and race—and be willing to take action.** Adopt an attitude where continuously evaluating power and privilege is part of your daily work. Be willing to see where racism, sexism, homophobia, and ableism are present in your organization's culture and take principled action to undo it.
- **Redefine “risk” and “failure.”** Acknowledge that foundations have far more “risk capital” to spare than the organizations you support, so be willing to take bold action. Explore the spaces and places that make you uncomfortable, and challenge yourself. Invite staff to see “failure” not as a bad thing, but as an opportunity to learn, pivot, and grow.
- **Coach rather than control.** Whether you're a trustee working with the CEO, or an ED interacting with staff, cultivate a coaching stance to bring out the best in your colleagues. Your job is to uplift, guide, and support your team in contributing to your mission and vision. This means soliciting their feedback, getting curious, and inviting them to reflect on what they're learning.
- **Invite collaborative culture-shaping.** Be creative in building a sense of agency and inclusion by opening opportunities for collective culture-building. Invite teams to shape, guide, inform, or reimagine various aspects of your culture — from small acts like choosing the welcome music for Zoom meetings, to larger considerations like paid holidays and staff retreats.

(n., pl.) What you do and how you show up as a grantmaker. This includes the process by which you identify grantees, how you disseminate funds, what information you collect, and how you show up in relationship with your grantee partners.

Too often, foundations get in the way of nonprofits doing the work they know best. This can slow down progress, perpetuate inefficiency, and obstruct nonprofit growth and innovation. Moreover, it creates a top-down power dynamic that makes it virtually impossible to build honest, transparent, mutually accountable relationships.

Trust-based philanthropy reimagines that dynamic, advocating for a concrete set of six grantmaking practices that, when practiced together, contribute to more just and equitable funder-grantee relationships.

“Our role as grantmakers changes when we use trust-based practices. Instead of being a compliance officer or gatekeeper, we become a thought partner and a shoulder for people to come to when they need it.”

PHILIP LI
ROBERT STERLING
CLARK FOUNDATION



“Trust-based philanthropy breaks down the traditional power dynamic between funder and grantee. It creates a collaborative environment that supports listening, learning, and the ability to be nimble.”

BRENDA SOLORZANO
HEADWATERS FOUNDATION

STEPS YOU CAN TAKE

- **Give multi-year unrestricted funding.**

The work of nonprofits is long-term and unpredictable. Multi-year, unrestricted funding gives grantees the flexibility to assess and determine where grant dollars are most needed, and allows for innovation, emergent action, and sustainability.

- **Do the homework.** Oftentimes, nonprofits have to jump through countless hoops just to be invited to submit a proposal. Trust-based philanthropy moves the onus to grantmakers, making it the funder’s responsibility to get to know prospective grantees, saving nonprofits’ time in the early stages of the vetting process.

- **Simplify and streamline paperwork.**

Nonprofits spend an inordinate amount of time on funder-driven applications and reports, which can distract them from their mission-critical work. Streamlined approaches focused on dialogue and learning can pave the way for deeper relationships and mutual accountability.

- **Be transparent and responsive.** Open, honest, and transparent communication supports relationships rooted in trust and mutual accountability. When funders model vulnerability and power-consciousness, it signals to grantees that they can show up more fully.

- **Solicit and act on feedback.** Philanthropy doesn’t have all the answers. Grantees and communities provide valuable perspectives that can inform a funder’s strategy and approach, inherently making our work more successful in the long run.

- **Offer support beyond the check.** Responsive, adaptive, non-monetary support bolsters leadership, capacity, and organizational health. This is especially critical for organizations that have historically gone without the same access to networks or level of support than their more established peers.



For a more detailed overview of trust-based grantmaking practices, download our guide at:
www.trustbasedphilanthropy.org/resources-articles/tbp-overview



RECOMMENDED RESOURCES

GUIDES

- Strategies for Aligning Practices and Values, *PEAK Grantmaking*
- Culture Resource Guide, *Grantmakers for Effective Organizations*
- Grantmaking with a Racial Justice Lens, *Philanthropic Initiative for Racial Equity*
- Guide to Great Funder–Nonprofit Relationships, *Exponent Philanthropy*

WEBSITES

- Family Identity and Culture, *National Center for Family Philanthropy*
- Resonance Framework, *Justice Funders*
- Resources on Equity, Diversity, and Inclusion, *CHANGE Philanthropy*
- White Supremacy Culture Characteristics, *(Divorcing) White Supremacy Culture*

BOOKS

- *HOLDING CHANGE*, adrienne maree brown
- *DECOLONIZING WEALTH*, Edgar Villanueva
- *LETTING GO*, Ben Wrobel and Meg Massey

TRUST-BASED PHILANTHROPY TOOLS

- Trust-Based Templates
- Six Practices of Trust-Based Philanthropy
- Story Map
- Self-Reflection Tool



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