



Trust-Based Philanthropy Project

2022 Community Survey Insights

Contents:

Overview	2-3
A note on self-selection bias	
Where are organizations on their trust-based journey?	3
Key Insights	4-7
<ul style="list-style-type: none">• Grantmakers resonate with the emphasis that trust-based philanthropy places on building authentic and long-term relationships with grantees• Grantmakers see trust-based philanthropy as a strategy to carry out their racial equity goals• Only 29% of respondents say their organization’s grantmaking is more than 50% unrestricted <i>and</i> multi-year• Resistance from boards/trustees is the most identified barrier to implementing trust-based philanthropy• Challenges for implementing trust-based philanthropy vary depending on the size and structure of an organization• Survey respondents identify the Trust-Based Philanthropy Project’s webinars as the most effective and useful tool in their organization’s journey, compared to other offerings by the Project	
Misperceptions	7
Resource/Tool Recommendations	7-9
Conclusion	9-10

Overview

In early 2022, the Trust-Based Philanthropy Project shared our Community Survey with the trust-based network of funder-practitioners who are leading and learning about this work. We wanted to hear directly from the people doing this work and to determine how the trust-based philanthropy framework is resonating in the grantmaking sector. We are incredibly grateful to everyone who took the time and care to respond to the survey.

This report is based on the **141 responses we received to the Community Survey.**

Three goals helped guide the survey design, questions, and recommendations:

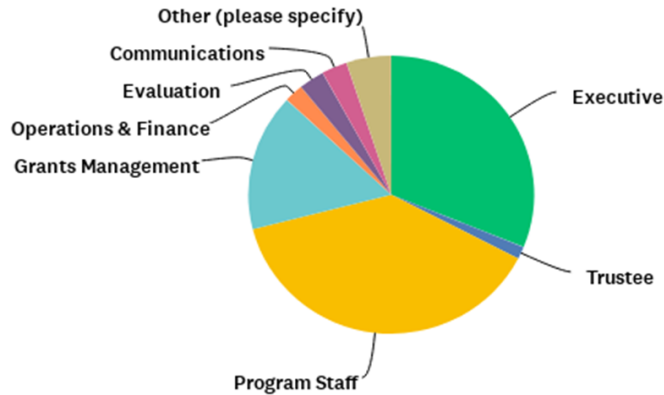
1. What aspects of trust-based philanthropy grantmakers are most engaged with,
2. Which tools and resources are most effective, and
3. What challenges and misperceptions are getting in the way.

Intended Audience

The primary audiences for this report include the Trust-Based Philanthropy Project's staff and steering committee, as well as trust-based funder-practitioners who actively advocate for this approach. This report also yields insights into opportunities for continued adoption of trust-based philanthropy by other partners and the wider philanthropic community.

Participants

We collected data from individuals who work at grantmaking institutions. Participants were asked to self-select the category that best describes their role. We received our largest number of responses from **Program Staff (38.4%)**, **Executive Staff (31.16%)**, and **Grants Management (15.94%)**. Each of the other categories made up less than 5% of responses.

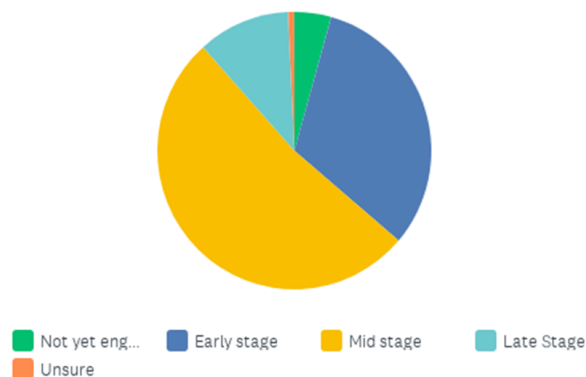


A note on self-selection bias:

The majority of those who responded to this survey have had some level of engagement with the Trust-Based Philanthropy Project's offerings, so this data is not intended to be representative of the entire philanthropy ecosystem, but rather those who are actively attempting to embrace and adopt trust-based values, practices, and culture.

Where are organizations on their trust-based journey?

- ❖ 52% of respondents said they were in the mid-stages of their trust-based journey while 39% said they were still in the early stages. Only 11% of respondents were in the late stages.



- ❖ Organizations at the mid-stage of their trust-based philanthropy journey have implemented some or all practices. For some, there is no formal commitment

to continue practices beyond one grant cycle. At this stage, board members are engaged but are still learning and maybe earlier in their journey than foundation staff.

- ❖ Organizations that are in the early stages of implementation are beginning to learn and talk about trust-based philanthropy. For some, there is a struggle with internal alignment on what the approach is or what it looks like in practice. Respondents at this stage cite the Covid-19 pandemic as the catalyst for conversations about rethinking their grantmaking structure, with an interest in becoming trust-based but without fully articulating it into practice.

“One of our biggest challenges is an internal senior leader who insists that trust-based philanthropy is totally adaptable and fluid, to the degree that they consider our previous philanthropic work to be trust-based as well (even though it stands in stark contrast to the principles and values that TBP advances). While it is true that trust-based philanthropy is fluid and adaptable, there are minimum standards/expectations. It might be helpful for TBP to refine its language a little to raise the minimum bar for leaders like this one.”

– Respondent: Grants Management, Early Stage of Trust-Based Philanthropy Journey

Key Insights

- ❖ **Grantmakers resonate with the emphasis that trust-based philanthropy places on building authentic and long-term relationships with grantees.**
 - The theme of building trust and partnership as a means to reducing power hierarchy is prevalent in the open-ended responses.
- ❖ **Grantmakers see trust-based philanthropy as a strategy to carry out their racial equity goals.**
 - In tandem with building relationships, survey respondents see reevaluating their values and practices as essential to racial equity work.

❖ **While unrestricted funding is only one aspect of a trust-based approach, we wanted to understand how the community viewed and was implementing flexible funding. Only 29% of respondents say their organization's grantmaking is more than 50% unrestricted and multi-year.**

- Based on the open-ended responses, unrestricted funding is more widely practiced than multi-year funding.
- Grants that are multi-year are likely to be restricted. Open-ended responses indicate that implementing multi-year funding into their grantmaking is more difficult and will require more strategic planning.

"We have tried this before but it has been difficult for board members who do not have relationships with the organizations we support. We are starting a new strategic framework and hope that with these resources, we will be able to move in that direction."
- Respondent: Program Staff, None of our funding is currently multi-year and unrestricted

"Almost all of our grantmaking is multi-year. We also always allow rebudgets. But the idea of unrestricted grants is just silly - we don't want our grantees to keep on putting band-aids on bad things. We want our grantees to change systems - and to do that a plan (and budget) is a good thing."
- Respondent: Executive, None of funding is currently multi-year and unrestricted

❖ **Resistance from trustees/board is the most identified barrier to implementing trust-based philanthropy.**

- 34% of respondents stated their board/trustees were fairly invested in trust-based philanthropy, while only 17% said their boards were fully committed.
- Survey respondents largely point to the fact that their boards are unwilling to let go and redistribute power as the prime reason they are reluctant to shift to a trust-based model. Conversations about race and power can be tense.

- In the open-ended responses, another commonly identified signifier of a board’s resistance to becoming trust-based is a lack of engagement with staff and the community. As a result, trustees lag behind in learning and/or have a misconstrued perception of how trust-based philanthropy works.
- Respondents point out that many of their foundation boards/trustees are hesitant or actively resistant to this approach because they believe that impact can only be measured by quantitative data. According to open-ended responses, their boards grapple with the idea of losing control as a result of new ways of doing things.

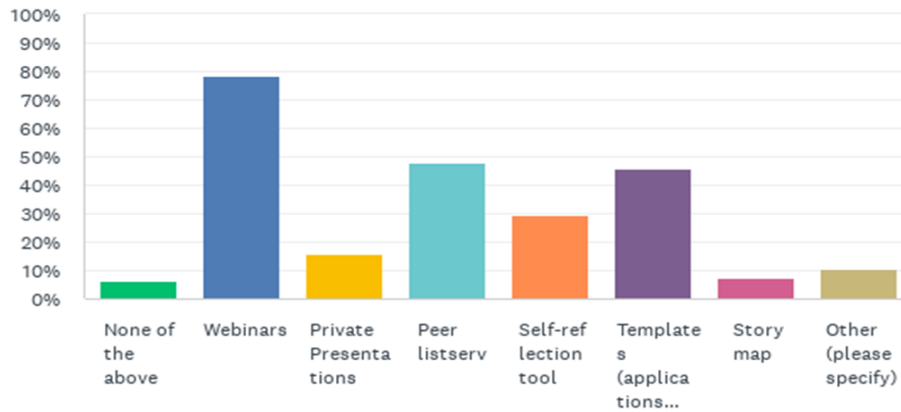
“Our board members are supportive on the surface, but we encounter substantial resistance with some (especially family members) when we recommend changes that limit their authority or ask for changes to their behavior. Our staff participate frequently in events and refer often to readings, and we have benefited greatly from them; however, I don't think those resources will get sufficient attention or inspire change among the board. Our board is open to an evaluation process, and I am thinking of implementing it through a trust-based lens.”

- Respondent: Executive, Somewhat Committed Board

❖ **Challenges for implementing trust-based philanthropy vary, depending on the size and structure of an organization.**

- Grantmakers at family foundations point to their board’s apprehension about having honest conversations about race and power.
- There is a perception that engaging in trust-based philanthropy creates a more burdensome workload for staff at small foundations.
- For community foundations, balancing the needs of donors with the desire to remove grantee burdens can sometimes feel at odds.

❖ **Survey Respondents identified the Trust-Based Philanthropy Project’s webinars as the most effective and useful tool in their organization’s journey**



Misperceptions

The three main misperceptions we heard from survey respondents were:

- ❖ The misperception that trust-based philanthropy is based on unconditional trust
- ❖ The misperception that impact can be measured only by quantitative data
- ❖ The misperception that trust-based philanthropy has little rigor or methodology

Resource/Tools Recommendations

Respondents found the following tools and resources to be helpful in advancing their own understanding, or supporting others in adopting a more trust-based approach:

- ❖ **Trust-Based Philanthropy in 4D:** Open-ended responses indicate that people are attracted to trust-based philanthropy because they want to make long-term organizational shifts in the field. Concurrently, there are some misperceptions that trust-based philanthropy has no methodology, is not strategic, and does not require an equity lens. This underscores the need for

speakers to continue to incorporate the 4-Dimension approach (Culture, Structures, Leadership, Practices), making the connection to racial equity explicit, and speaking to how it shows up in their work when talking about trust-based philanthropy.

- ❖ **Resources that focus on both unrestricted and multiyear funding:** When it comes to unrestricted and multiyear funding, many foundations are taking an either-or approach. The Trust-Based Philanthropy Project can offer a webinar or guide that takes grantmakers through the stages and implementation of these strategies.
- ❖ **Tools/examples for measuring impact and success:** The Project is supporting a new framework and narrative around “impact measurement” rooted in trust-based values, and it is resonating with what grantmakers are seeking.
- ❖ **Case Studies:** An organization’s trust-based journey can vary based on the type of institution, staff size, board makeup, history, and other factors. Organizational case studies could serve as a way for other funders to learn about different tactics and strategies rooted in one deep-dive example. As the Project completes its work in December 2024, it should consider creating a repository of case studies that outline different organizations’ processes, successes, challenges/barriers, and other learnings.
- ❖ **Resources for Bottom-Up Leadership:** Pushback from leaders in decision-making roles is consistently brought up as a barrier to meaningfully implementing a trust-based approach. The Project can develop tools or webinars that address the specific obstacles of bringing hesitant or resistant supervisors and leadership along in adopting a full trust-based approach. These resources can offer succinct language for discussing trust-based philanthropy, how to address common misperceptions, and examples from other grantmakers in the field who have brought these ideas and approaches into their organizations, despite not being in decision-making roles.

Respondents named a desire for an introductory, high-level video about trust-based philanthropy:

❖ **20 Minute-Introduction Video:** The Trust-Based Philanthropy Project has been considering creating a short introductory video to support self-guided learning and education. We asked respondents to offer input on this idea, and many noted some level of interest:

- 60% of survey participants stated that an introductory video would be useful. Most opened-ended responses indicated it would be most useful to share as a learning tool for board, donors, and onboarding staff.
- Topic suggestions included: specific examples of funders applying principles and practices, an overview of trust-based metrics & evaluation, perspectives from board members, 4D framework, and how racial equity is central to this approach.
- Many of the people who responded with “maybe” or “no” raised concerns about 20 minutes being too long, or are already further along in their journey.

Conclusion

The learnings from the 2022 Community Survey reflect what we’re hearing from the community of trust-based funders, through previous programming surveys, private engagements, and conversations. Trust-Based Philanthropy appeals to grantmakers who believe that redistribution of power in the field is essential to building a sector that is more equitable, responsive to community needs, and doesn’t make access to funds burdensome for leaders on the ground. This goal, however, is complicated by resistance from those who have formal organizational decision-making power based on misperceptions about the purpose and goals of trust-based philanthropy.

In 2022, Trust-Based Philanthropy Project is tackling these challenges by prioritizing the following:



- 1. Support and advance organizational change efforts among those who are already working to bring trust-based values, practices, and culture into their institutions*
- 2. Inspire and engage funders whose misconceptions may still be holding them back from adopting a more trust-based approach*
- 3. Reframe impact and evaluation in order to invite a more expansive view of “impact” rooted in learning and accountability to community*

The momentum for a philanthropic field that is centered on trust, relationships, curiosity, humility, and equity is growing. The insights and recommendations outlined in this report will help the Trust-Based Philanthropy Project sharpen tactics to achieve the priorities listed above. We are excited to continue to engage with and support your work through conversations, webinars, speaking engagements, tools, and resources, as well as shared spaces for learning out loud, such as the Trust-Based Philanthropy Project’s peer listserv.

As always, we welcome your additional thoughts and feedback:
hello@trustbasedphilanthropy.org.