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Trust-Based Philanthropy Summer Learning Series – Part 2

July 20, 2021
10-11:30am PT

TBP Summer Learning Series

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Part 1: The Purpose, Culture, and Values of Trust-Based Philanthropy

Tues. June 8
10:00-11:30am PT

Part 2: Exploring the Principles: Unrestricted Funding, Doing the Homework, Streamlined Paperwork

Tues. July 20
10:00-11:30am PT

Part 3: Exploring the Principles: Transparent Communication, Soliciting Feedback, Support Beyond the Check

Tues. Sept. 14
10:00-11:30am PT

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Today's Agenda (PDT)

10:06am Refresher on TBP

10:15am Background & Rationale for 1) Multiyear Unrestricted Funding, 2) Doing the HW,   and 3) Streamlined Paperwork

10:20am The Arc of a Grant: Three Examples

10:50am Challenges & Lessons

11:02am One Next Step

11:05am Transition to Breakout Discussions

11:30am Adjourn

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Today's Speakers

Holly Bartling
Senior Program Officer
General Service Foundation

Philip Li
President & CEO
Robert Sterling Clark Foundation

Brandi Yee
Chief Program Officer
ACT for Alexandria
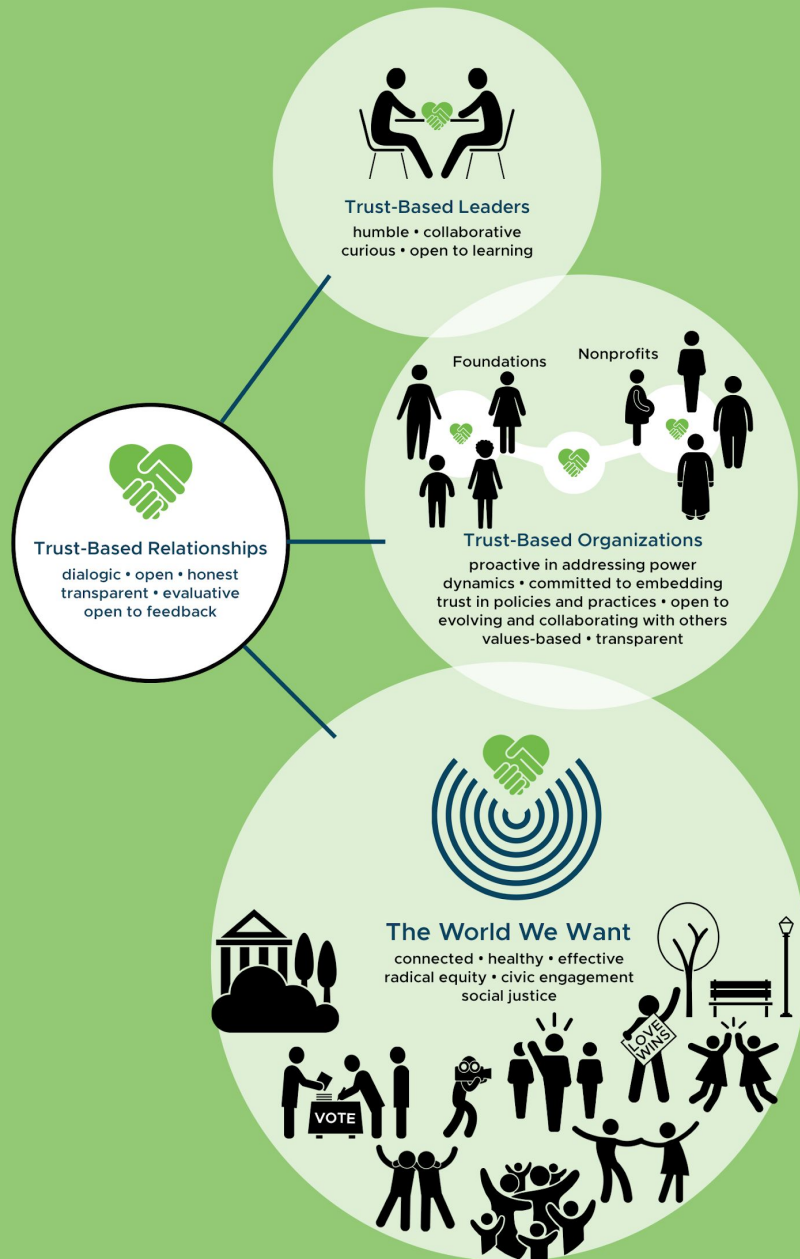
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Trust-Based Philanthropy

An approach to giving that **addresses the inherent power imbalances** that exist between funders, nonprofits, and the communities they serve. At its core, trust-based philanthropy is about **redistributing power** -- systemically, organizationally, and interpersonally -- in service of a healthier and more equitable nonprofit ecosystem. On a practical level, this includes **multi-year unrestricted giving, streamlined applications and reporting**, and a commitment to building relationships based on **transparency, dialogue, and mutual learning.**

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Trust-Based Ecosystem

Trust-Based Leaders
humble • collaborative
curious • open to learning

Trust-Based Relationships
dialogic • open • honest
transparent • evaluative
open to feedback

Foundations   Nonprofits

Trust-Based Organizations
proactive in addressing power
dynamics • committed to embedding
trust in policies and practices • open to
evolving and collaborating with others
values-based • transparent

The World We Want
connected • healthy • effective
radical equity • civic engagement
social justice

VOTE

LOVE WINS

A Values-Based Approach

- **Acknowledge power dynamics**

- **Trust grantees and communities**

- **Embrace a learning mindset**

- **Commit to systemic equity**

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Four Dimensions of TBP

Fundamental beliefs that drive attitudes, priorities, actions.

Your organization's general **'way of being.'**

VALUES

CULTURE

The external expression your values and culture. **What you do.**

PRACTICES

LEADERSHIP

Decision makers **uphold and reinforce** values and culture

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6 Practices of Trust-Based Philanthropy

Give Multi-Year Unrestricted Funding

Do the Homework

Simplify & Streamline Paperwork

Be Transparent & Responsive

Solicit & Act on Feedback

Offer Support Beyond the Check

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6 Practices of Trust-Based Philanthropy

1. Give Multi-Year Unrestricted Funding

2. Do the Homework

3. Simplify & Streamline Paperwork

4. Be Transparent & Responsive

5. Solicit & Act on Feedback

6. Offer Support Beyond the Check

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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.

Get curious: *Who is most likely to get unrestricted funding? Despite the vital importance of this type of support, organizations led by people of color are significantly less likely to receive it. A recent study found that net unrestricted assets for organizations led by Black leaders are 76% smaller than for those with white leaders.[1]*

Do The Homework

Oftentimes, nonprofits have to jump through countless hoops just to be invited to submit a proposal. Trust-based philanthropy flips that script, making it the funder's responsibility to get to know prospective grantees, saving nonprofits time in the early stages of the vetting process.

Get curious: *When doing the homework, are you gravitating toward leaders or organizations that feel comfortable or familiar? Push yourself to recognize implicit biases in real-time. The ideal partners are ones that demonstrate accountability to and collaboration with the communities they serve.*

Simplify & 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.

Get curious: *What is the purpose of your foundation's applications and reports? What are the implications for small or emerging organizations that have limited bandwidth or that lack formal training in grantwriting?*

TBP isn't new

This is a journey, not a checklist

It looks different for different orgs

Breakout Discussions

If you're affiliated with a participating PSO 🞏 you will be automatically assigned to a room

If you're not affiliated and want to engage in a discussion 🞏 stay in the main room

If you're a PSO member and are NOT automatically assigned 🞏 tell the TBP team and we'll help you get there!

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