



# 2024 GRANTMAKER SURVEY REPORT

*Adoption and Perceptions of Trust-Based Philanthropy*



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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.*

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# EXECUTIVE SUMMARY

As part of our ethos of learning and iteration, the Trust-Based Philanthropy Project conducts a survey to understand how grantmaking professionals are understanding and adopting trust-based philanthropy. Since our inception in 2020, this survey has been one of several strategies to assess our impact and clarify opportunities to strengthen our work. This year, as we celebrate our five-year anniversary and build out our next chapter, we are eager to apply these learnings toward making trust-based philanthropy the standard of practice among all philanthropies committed to a just and equitable society.

This report analyzes data from our third grantmaker survey conducted in the summer of 2024. Our goals were to assess how funders are defining, operationalizing, and grappling with trust-based philanthropy, and what changes they have made and sustained since 2020. Based on responses from 577 respondents, most of whom self-identified as supportive or champions of trust-based philanthropy, we observed the following:

## Comprehension & Usage

- The majority of respondents were able to articulate a relatively accurate comprehension of trust-based philanthropy, most notably its focus on shifting power and building relationships. Still, more than a quarter of respondents (26.8%) demonstrated a limited and/or oversimplified understanding of the approach.
- Sixty-three percent of respondents noted that their foundations do not publicly acknowledge their work as “trust-based” even though they employ aspects of trust-based philanthropy. This indicates an inconsistency and uncertainty in using the label, even among proponents of the approach.

## Shifts Toward Trust-Based Philanthropy

- Support beyond the check (77%), streamlining applications (74%), and soliciting feedback (73%) were the top most reported actions taken or sustained in the last five years. Internally-focused changes ranked the lowest in reported changes. This discrepancy demonstrates that many are prioritizing external, grantee-facing behaviors over the deeper internal work of organizational change.
- Nearly two-thirds of respondents (66%) noted that their organizations had shifted their learning and evaluation to be more trust-based, equitable, and/or grantee-centric. Examples of this shift varied widely, from co-creating metrics with grantees, to streamlining applications, to embracing more learning practices.
- There is evidence of boards embracing more of an orientation toward trust and learning. The majority of respondents noted that their boards place a high level of trust in the staff (69%), and that they strive to learn from the communities served (58%).
- There is inconsistent understanding and adoption of standards for funder accountability, even though roughly half of respondents reported that they have made shifts to hold themselves more accountable.

## Contributors & Barriers to Adoption

- The highest ranking personal motivations for embracing trust-based philanthropy are a belief in centering community needs (88%) and redistributing power toward advancing systemic equity (85%).
- The highest reported contributors to organizational change were exposure to new ideas from the Trust-Based Philanthropy Project (56%) and feedback from grantees (55%).
- The top reported barriers to organizational change were limited time and capacity (35%) and challenges in applied learning and evaluation (32%). This is a shift away from previous years where board resistance was the most frequently cited barrier.

Overall, we are bolstered by the findings in this survey – as an affirmation of our efforts over the last five years, as well as an illumination of how we can focus our efforts for our next five. We see new opportunities to reinforce a holistic understanding of trust-based philanthropy; to address some of the underlying perception and mindset barriers; to support continued networking and learning among trust-based funders; and to catalyze deeper commitment and advocacy.



# OVERVIEW

In July and August of 2024, the Trust-Based Philanthropy Project conducted its third grantmaker survey to learn how grantmaking practitioners are adopting, defining, and thinking about trust-based philanthropy.

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

- To understand general perceptions and comprehension of trust-based philanthropy
- To assess practical, structural, and cultural shifts that have occurred among grantmaking organizations since 2020
- To gauge how trust-based philanthropy is being operationalized among grantmaking organizations
- To understand the obstacles and accelerators to embracing and/or operationalizing trust-based philanthropy

This report covers key areas of insight surfaced from 573<sup>1</sup> respondents:

- General comprehension of the trust-based philanthropy approach
- The reported shifts towards trust-based philanthropy, both internally-facing (culture, structures, and leadership), and externally-facing (grantmaking practices and relationships)
- Personal motivations and organizational alignment for pursuing trust-based philanthropy
- Contributing factors that have supported and hindered organizational change

## Methodology

The 19-question survey was developed internally by the Trust-Based Philanthropy Project staff, utilizing a mixed methods approach to collect both 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:*** Though the survey was designed and promoted to be relevant to any grantmaker, regardless of familiarity with trust-based philanthropy, the majority of responses came from those who are actively attempting to embrace and adopt trust-based values, practices, and culture. In fact, 89% of respondents reported being supportive and/or embracing trust-based philanthropy. Thus, this data is more representative of a highly engaged and familiar audience and is not intended to be representative of the experiences of grantmakers across the entire philanthropy ecosystem.

<sup>1</sup> While there was a total of 573 respondents, the response rates varied since not all questions required an answer. The average response rate was approximately 400 responses per question.

## Survey Respondents

*This report is based on responses from 573 individuals representing grantmaking organizations. A full breakdown of participant demographics can be found in appendix A.*

### Professional Roles:

Participants were asked to self-select one option that best described their role in their organization. Thirty-two percent identified as Program Staff, 28% as Executive Staff, and 18% as Grants Management.

### Geographic Representation:

The majority of respondents (80%) were located in the United States, with a large representation from the West Coast/Mountain West (26%), the East Coast (20%), and the Midwest (18%). Approximately 10% represented global and/or multi-regional geographic locations. It should be noted that some funders work remotely and might not be working in the same geographic location as their organization.

### Organization Types:

Nearly half of respondents represented private foundations (23%) or family foundations (21%). Community foundations ranked in the next largest category at 15%. More than half of respondents had annual grantmaking budgets of under \$5M (52%), and just under a third reported having annual grantmaking budgets between \$5M and \$24.9M (30%).

### Orientation toward Trust-Based Philanthropy:

An overwhelming majority of respondents reported being either a champion (55%) or supportive (34%) of trust-based philanthropy. As such, the results of this survey are highly representative of those who have a relatively deep level of engagement with trust-based philanthropy concepts.



# TERMINOLOGY

## Comprehension and Usage

### General Comprehension of Trust-Based Philanthropy

**When prompted to define trust-based philanthropy in one or two sentences, the majority of respondents were able to articulate a relatively accurate comprehension of the approach.** The most prominent themes in the open-ended responses included trust-based philanthropy's focus on relationships (41.5%) and/or its priority on shifting power (33.9%). Other relevant themes included listening to needs of those in the community, transparency and flexibility in funding practices, leading with trust, and aligning values to practices.

“*TBP involves a series of principles and practices that aim to address and rectify the power imbalance between funder and grantee. It's about redistributing power – from funders to grantees. Building a more reciprocal, trusting relationship, and creating a more equitable landscape.*”

Among those who demonstrated a relatively accurate comprehension, many expressed an understanding that this is a holistic, values-driven philanthropic approach that includes both *what* you do and *how* you do it.

“*TBP is an approach, a values system, a methodology, a strategy, and a way of being. It is rooted in mutually accountable relationships, an awareness of power dynamics, a centering of community expertise and voice, and active practices to intentionally make the world a more just and equitable place.*”

**However, more than one-quarter (26.8%) of the open-ended responses revealed a limited and/or oversimplified understanding of trust-based philanthropy.** For example, some equated trust-based philanthropy to grantmaking practices such as streamlining applications, giving unrestricted funding, and/or offering technical support. This is indicative of the prevailing misperception that trust-based philanthropy is a rigid set of grantmaking practices to adhere to, rather than a holistic values-centered approach to be embraced in the culture, structures, and ethos of an organization.

Some of the limited definitions offered broad oversimplifications that point to a lack of understanding about trust-based philanthropy's orientation toward shifting power. For example, some considered trust-based philanthropy to be about letting people on the ground make all grant decisions, indicating a conflation between the role of nonprofits and community members. Some of these responses overtly mistook trust-based philanthropy as synonymous with participatory grantmaking, while others seemed to hint at it.

While not prominent, there were a small fraction of definitions that perpetuated misinformation about trust-based philanthropy, namely that it lacks accountability, is a no-strings-attached approach, and that it is not outcomes-oriented. Given that these are some of the most commonly documented misperceptions of trust-based philanthropy, it is not entirely surprising to see evidence of them among the open-ended responses.

### **Implications for the Trust-Based Philanthropy Project:**

It is encouraging to see that the majority of respondents demonstrate a relatively strong comprehension of trust-based philanthropy and the core values that drive it. It is an indication that most have been exposed to and engaged with programming, writings, and resources provided by the Trust-Based Philanthropy Project and our partners.

It is notable, though, that even among this engaged group, there are still reductionist and incorrect perceptions of trust-based philanthropy. Part of this limited focus may be due to the tangible nature of the six grantmaking practices, which focus on the funder-grantee relationship and are more concrete and actionable than the complex culture work that undergirds the approach.

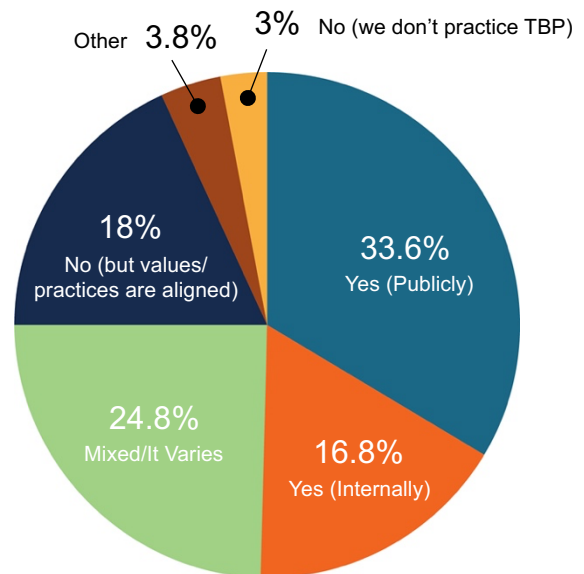
In general, this data reinforces that we are on the right track with advancing a nuanced understanding of trust-based philanthropy, but that we have more work to do to ensure that fans of the approach have the tools to understand it more holistically, and that they feel equipped to share that knowledge with others. We also need to continue to address the misinformation and confusion surrounding trust-based philanthropy, through continued narrative work and resource development that emphasizes the highly relational, mutually accountable, and impact-oriented nature of the approach.

## **Usage of the Trust-Based Philanthropy Label**

In recent years, the Trust-Based Philanthropy Project has observed that some funders may be reluctant to embrace the terminology “trust-based” to describe their work – even when they may be actively embracing trust-based practices. To shed more light on this, the survey included a question to assess whether the respondents’ organizations identify as “trust-based”, along with an open-ended comment section to get more context.

**Q11: Does your organization identify as being trust-based, or doing “trust-based” philanthropy?**

- Yes (Publicly) – **33.6%**
- Yes (Internally) – **16.8%**
- Mixed/It Varies – **24.8%**
- No (but values/practices are aligned) – **18%**
- No (we don’t practice TBP) – **3.8%**
- Other – **3%**



Roughly one-third of respondents (33.6%) noted that their organizations publicly acknowledge their work as “trust-based”. Among these respondents, many saw it as an important way to both influence other funders, and to hold themselves accountable to the core values of trust-based philanthropy.

“*In the past couple of years, we weren’t public as staff working and building buy-in and learning with the board. Now we are - it’s on our new website for example. The accountability work comes in as ensuring we a foundation are aligned with TBP and our values.*”

“*We publicly acknowledge [trust-based philanthropy], based on partner feedback. If they felt otherwise, we would not present it as such. We advocate for TBP [to other funders] whenever possible.*”

However, this orientation toward advocacy and accountability was not universal among all whose organizations claim the public label of trust-based philanthropy. In fact, a number of respondents noted a challenge of rhetorical adoption, i.e., using the label without actually committing to the real work it entails.

“*While there has been progress made [...] we want to pick and choose aspects that we like about TBP and let go of the rest. For example, [we have been] willing to implement unrestricted and multi-year funding, but unwilling to look at the root issues of systemic inequality, particularly regarding race.*”

The majority (62.7%) noted that their foundations do *not* publicly acknowledge their work as “trust-based” even though they did admit to employing aspects of trust-based philanthropy. This is significant, especially given that 89% of total survey respondents identify as supporters and/or champions of trust-based philanthropy. Among these respondents, there were a range of reasons shared for why the public label may not be used. Many acknowledged that their organizations were still on the journey of trust-based philanthropy and were not yet embodying it holistically; therefore, they saw it as disingenuous to claim the label:

“*At this point we wouldn’t identify as trust-based, in full. We are working towards it.*”

“*We acknowledge it internally as something we are working towards, but haven’t used the terminology externally (but we do communicate TBP values externally).*”

“*We have specifically named TBP as the approach we are striving for internally. However, we have not stated this publicly because the truth is that we are not there yet - we are doing some TBP practices in some cases.*”

There were a handful of respondents who admitted that they are practicing trust-based philanthropy, but that they want to avoid being self-promotional or self-congratulatory about it.

“*It is just the way our Foundation operates. There is no “tooting our own horn” for doing the work in this manner. It’s how we have historically operated.*”

“*We don’t use this [as] a ‘feather in our caps’ externally, because that’s not why we do it.*”

Others noted that while they do identify with many of the core values of trust-based philanthropy, they preferred alternate frames, such as “equitable” or “relational” grantmaking, since those terms don’t have the same implications for criticism or misrepresentation as trust-based philanthropy does.

Finally, there was a subset of respondents who noted that the understanding and embrace of trust-based philanthropy was just too uneven within their organizations to merit a full public embrace of the banner. Notably, many named the skepticism or lack of readiness of the board. Others pointed out the misperception among colleagues that trust-based philanthropy is only relevant to the funder-grantee relationship, and, as a result, their leadership don’t see it as relevant to their work.



# SHIFTS TOWARD TRUST-BASED

## Practices, Culture, Structures & Leadership

### Reported Shifts in the Last Five Years

Given the variation in trust-based philanthropy adoption, we invited respondents to reflect on the actions they had taken or sustained in the last five years (since the Project’s inception). The survey included a list of actions that were representative of trust-based grantmaking practices, as well as actions that are more internal, specifically related to trust-based structures and cultures. Respondents had the opportunity to check all actions that were relevant to them, and were also provided an open-ended option to write in other actions that they believed were relevant to trust-based philanthropy.

**Q5: Which of the following actions has your organization implemented and/or sustained in the last five years? (Check all that apply)**

RESPONSES	ANSWER CHOICES
77%	Instituted support beyond the check
74%	Streamlined application processes
73%	Used grantee feedback
71%	Streamlined reporting processes
70%	Introduced/increased unrestricted grants
69%	Improved transparency & responsiveness
66%	Introduced/increased multi-year grants
52%	Took steps to proactively do the homework
47%	Reexamined org structures
41%	Assessed/improved org culture
25%	Did a racial equity audit
15%	Took another TBP-aligned action
1%	Took no relevant actions

The most frequently noted practice change was support beyond the check (77%). This practice encompasses a range of non-monetary offerings that grantmakers provide to nonprofit partners, such as capacity building support and making introductions to other funders and partners. The next most frequently noted practice was streamlining application processes (74%), which includes actions like accepting proposals written for other funders or reducing the number of application questions. Using feedback from grantees to inform grantmaking processes and strategies came in a close third, at 73%.

These initial findings are relatively consistent with the reported shifts from our 2023 grantmakers survey, with the caveat that the question was not framed identically to last time. In 2023, the highest ranked shifts were streamlined applications and reports (90%), support beyond the check (71%), and introducing or increasing unrestricted grants (71%). While the adoption of unrestricted funding has remained relatively consistent since 2023, our data indicates a slight increase in the adoption of multi-year funding; 66% of respondents reported to have introduced or increased multi-year grants, compared to 47% of respondents in 2023.

Interestingly, the lowest ranked changes were all internally-focused. Less than half of respondents reported reexamining their organizational structures (47%). Even fewer reported conducting an internal assessment to improve their organizational culture (41%). Significantly, only 25% reported conducting a racial equity audit or undergoing racial equity training in the last five years. This points to a lack of readiness, awareness, and/or prioritization of the interconnection between trust-based philanthropy and racial equity work.

Overall, these findings indicate that the majority of trust-based practitioners are more focused on the funder-grantee relationship than the holistic TBP 4D framework. This observation was also reflected in the write-in comments regarding changes made in the last five years. For example, a number mentioned strategies to improve prospective and current grantees' access to the foundation, increased advocacy to support grantees' work, convening of grantees (which we define as "support beyond the check"), and heightened awareness around compensating nonprofit staff and community members for their time.

Notably, there was minimal articulation of cultural, structural, or leadership-oriented actions. Those who did acknowledge the deeper work pointed to the importance of making internal changes to include more community representation in their decision-making structures, and efforts to recruit and retain staff who were representative of the community served. One respondent noted the hurdle of internal misalignment, highlighting the challenge of practicing and embodying trust-based philanthropy when the leadership is not fully bought in:

**“ We also needed a change in leadership in order to incorporate trust WITHIN our own foundation. Before, we trusted grantees but not necessarily each other. [It's] so much better now. But it's a lesson that even foundations and leaders that espouse this philosophy can not necessarily practice it with their own teams.”**

### **Implications for the Trust-Based Philanthropy Project:**

The discrepancy between the high rate of adoption of trust-based *grantmaking* practices versus the lower rate of adoption of trust-based *cultural and structural* actions demonstrates that many are prioritizing external, grantee-facing behaviors over the deeper internal work. This finding aligns with our assessment of respondents' definitions of trust-based philanthropy in the terminology section, where many defined it primarily as an externally-facing approach to grantmaking rather than a holistic cultural approach to philanthropy. Additionally, the internal cultural and structural work requires a significant amount of time, as well as full buy-in of organizational leadership and staff, which has been repeatedly noted as a barrier to adoption when it comes to trust-based philanthropy. In order to support a more holistic adoption and understanding of trust-based philanthropy, the Project will need to do more intentional work to both communicate the benefits and tangible steps of cultural and structural change, and give more guidance, examples, and support for trust-based organizational development.

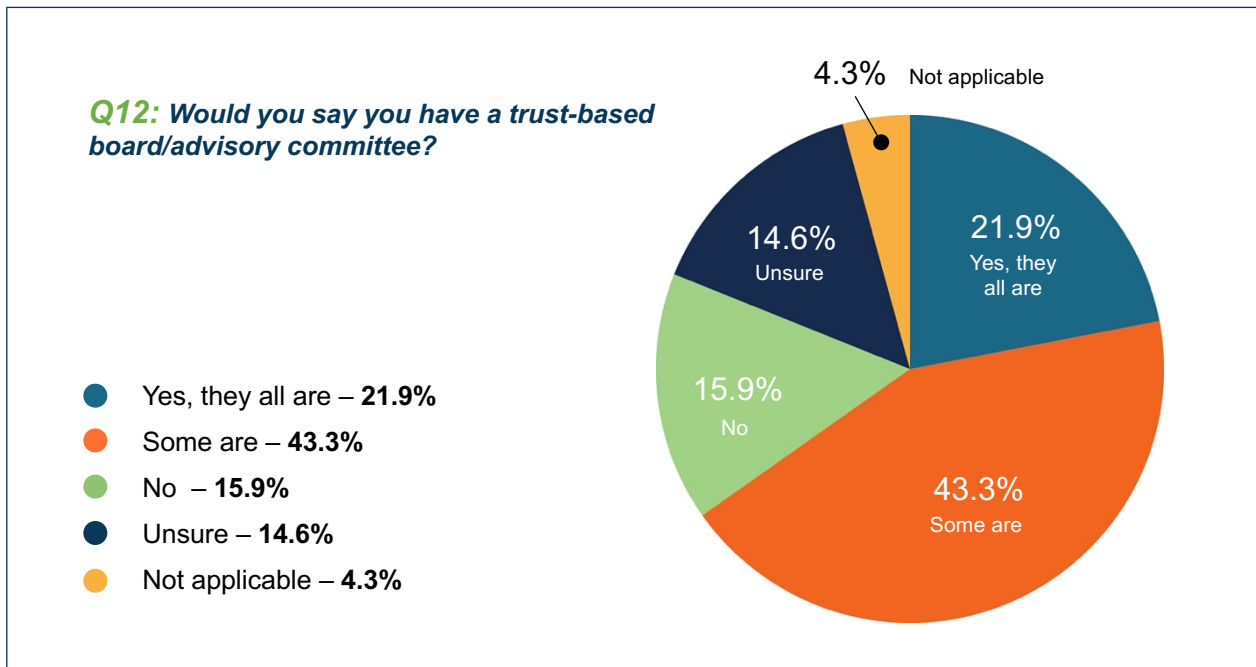
## Trust-Based Leadership & Governance

When asked about governance, the majority of respondents (65%) reported that they would consider all or some of their boards or advisory committees to be trust-based. About 15% of respondents were unsure, mainly due to their lack of proximity to the board. A slightly higher percentage (15.9%) reported that their boards were not trust-based.

Overall, this indicates a generally positive direction for boards embracing trust-based values in their governance structures. In the open-ended responses, many highlighted their boards' inherent desire to support and uplift their grantee partners, and their general inclination to trust both the staff and grantees.

“ Our board and staff lock arms. They place a high level of trust in staff.”

“ We don't have full support and buy-in from our board as they rely on what we hear and learn from the field or practitioners for our context.”

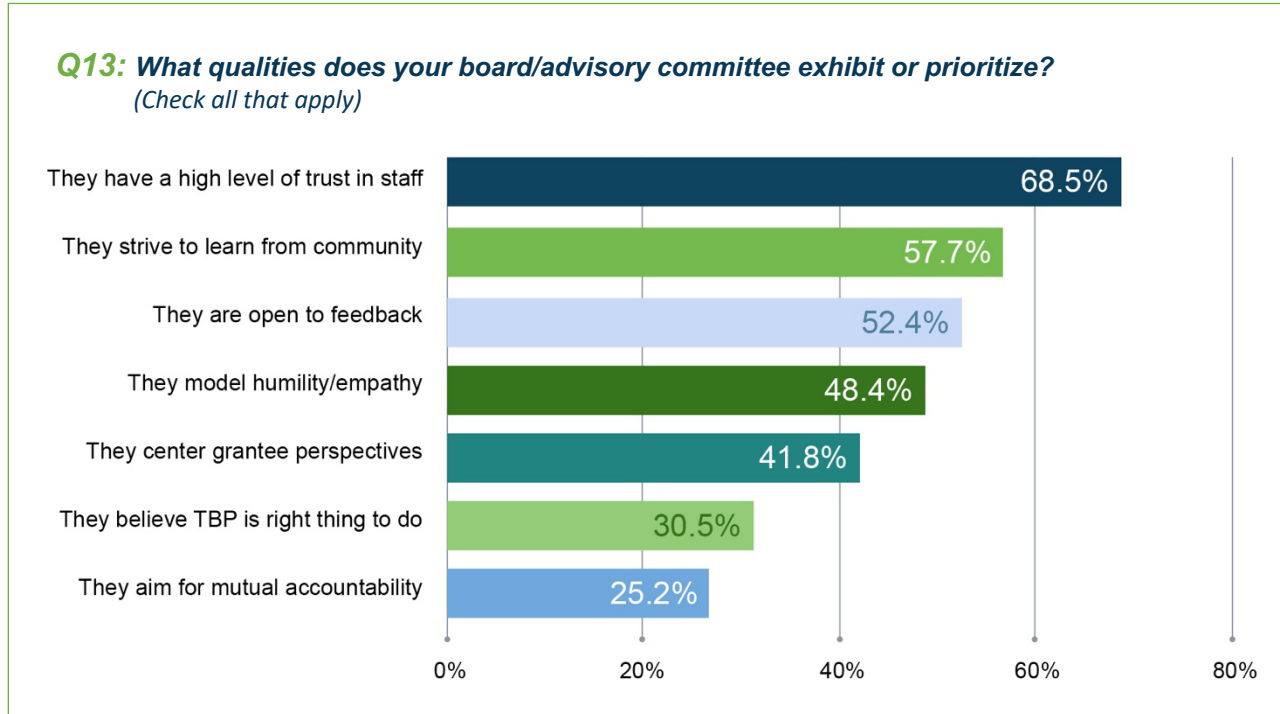


This pattern of boards generally trusting staff and grantees was backed up in the responses to a follow-up question about the qualities exhibited by their boards. In fact, the majority of respondents noted that their boards placed a high level of trust in the staff (68.5%), and that they strive to learn from the communities served (57.7%).

These respondents had a generally positive outlook about the direction of board engagement. Many reported that they had conducted board trainings and educational seminars to help their boards better understand trust-based philanthropy, and others shared that they had actively engaged their boards to more specifically understand their governance responsibilities in a trust-based context. A handful also mentioned that board turnover was creating more opportunities to evolve their governance culture and practices in line with trust-based philanthropy.

Among those who noted that only some or none of their board members could be considered trust-based, many cited the board's concerns about fiduciary responsibility, grantee accountability, and measuring impact. There was a general sentiment among some of these respondents that their boards felt more comfortable with conventional grantmaking practices as a way to ensure the necessary data and reporting to both assess impact and hold grantees accountable.

These findings were echoed in the responses to Q13, which revealed that the lowest-rated quality among boards is that they aim to be mutually accountable (25%). This speaks to the variation in understanding of the role that governance should play in a holistic adoption of the approach. It also reinforces a deeply donor-centric mindset that permeates much of the sector, especially among those in decision-making roles.

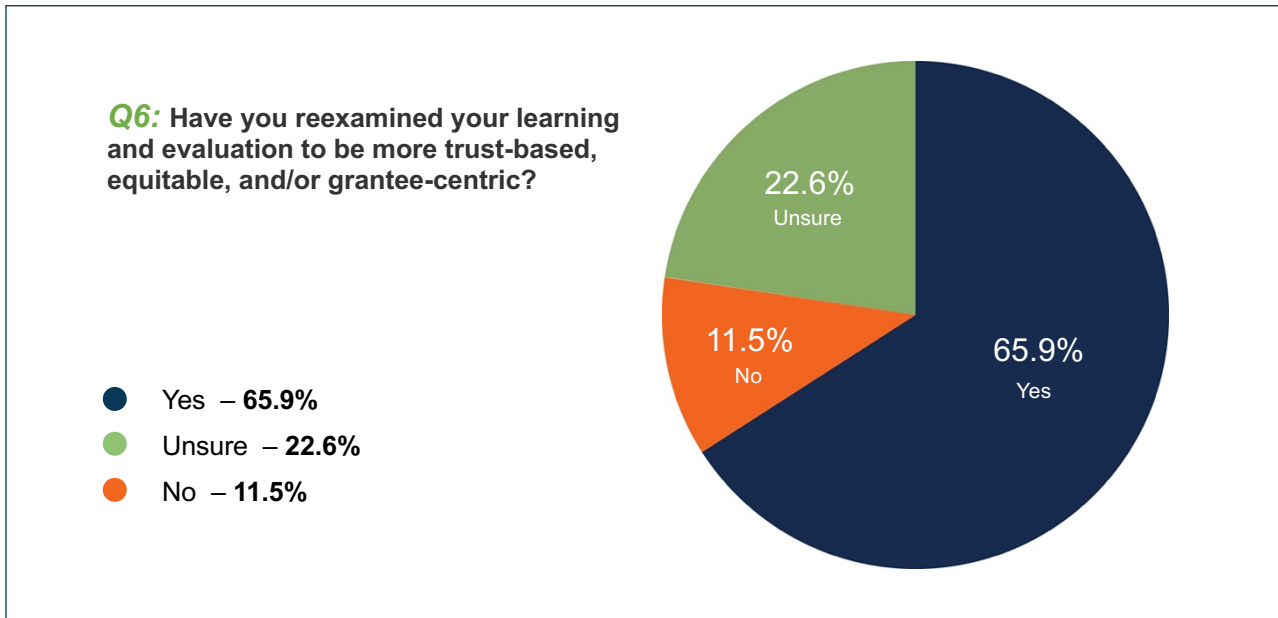


These trends suggest that while there is broad support for trust-based philanthropy and equity, there are challenges in implementation, particularly related to board governance, power dynamics, and resource allocation.

## Shifts in Learning & Evaluation Practices

For many organizations adopting trust-based philanthropy, some of the most common questions or challenges are related to learning and evaluation. Many funders have questions about how to assess and measure impact when reporting is being streamlined, and others may have questions about *how* to assess impact when funding isn't tied to specific programs or projects. To understand how things are evolving in this arena, we included a question about whether foundations were reexamining their learning and evaluation to be more trust-based, equitable, and/or grantee-centered.

Two-thirds of respondents noted that their organizations had reexamined their learning and evaluation with an intent to lean into more trust-based and/or equitable goals. Notably, 23% of respondents reported that they were unsure. This may be attributable to the role of respondents, as only 4% of survey participants were learning and evaluation staff.



Respondents had plenty to say in the open-ended comments section of this question, with nearly half of them offering additional context about their shifts toward trust-based, equitable learning and evaluation. Overall, there was a great deal of variation in how respondents defined these shifts, with some focusing on learning for organizational self-assessment and improvement, and others reflecting on how they are evolving their externally-facing impact assessment.

A number of respondents emphasized that they were shifting the way they evaluate to focus more on learning rather than proving impact. Similarly, others mentioned getting grantee feedback as a strategy for internal learning, in order to inform operational and strategic shifts.

Many articulated their streamlined reporting requirements as an example of how they had evolved their learning and evaluation processes. However, it was unclear in these responses whether shifts toward reduced and alternative forms of reporting were actually helping deepen or improve the foundation's learning overall.

Others lifted up that metrics are co-developed, and/or that parameters for success are derived from grantees rather than funder-led. These responses indicated a growing awareness that learning and measuring impact are not mutually exclusive:

“ We ask grantees, ‘What does success look like?’ Based on that answer, we co-design a learning process and develop key metrics together.”

“ We adopt our grantees’ goals rather than imposing the foundation’s goals on grantees. We co-create a foundation-grantee learning agenda and agree on what information the foundation will track based on what the grantee cares about.”

## Understandings & Expressions of Funder Accountability

Discussions around accountability have been a core component of the discourse around trust-based philanthropy. This discourse has included inquiry on how to hold grantee partners accountable, and what funder accountability looks like in a trust-based context. Due to this evolving inquiry, the survey included a question on funder accountability to better understand the ways funders are understanding and operationalizing accountability.

When asked “has your organization made any shifts to hold itself more accountable as a funder”, 52% said yes and 16% said no. Almost one third of respondents (32%) said they were unsure. This level of uncertainty is significant given that this group of respondents represents an engaged group of practitioners. It may indicate a general lack of focus on funder accountability, or a lack of clarity around what funder accountability truly looks like.

The qualitative data indicated a somewhat limited view of funder accountability, with most noting their practice of soliciting and acting on feedback as evidence that they are holding themselves accountable. Some noted their use of the Center for Effective Philanthropy’s Grantee Perception Report, a grantee survey that gives funders actionable insights based on candid grantee feedback. Others mentioned that they deployed other strategies to collect grantee feedback, such as focus groups, anonymous surveys, and check-ins.

Others lifted up general themes around building in stronger relationships with grantee partners, increasing their transparency and communication, involving partners with lived experience in decision-making, and embedding diversity, equity, and inclusion principles into their organizational operations.

A handful of respondents also lifted up standardizing their processes for more accountability and equity. This has looked like developing rubrics, metrics, and scorecards to measure themselves as funders, as well as to measure grantees and potential grantee partners during decision-making processes. They also lifted up regularly assessing themselves through trust-based lenses to hold themselves accountable. Many noted ongoing challenges with achieving accountability, noting issues with power dynamics and defaulting to the status quo.

While these are all great practices that are aligned with a trust-based approach, this data tells an interesting story of the overall lack of understanding of accountability within the field, even with the most engaged trust-based funders. For most, the understanding is limited. There is a lack of alignment on what mutual accountability looks like in a funder to grantee context, and even less of an understanding on how to operationalize it in a holistic manner. As many are defining ideals of funder accountability around surveys and feedback mechanisms, there still needs to be work done in the larger sector on understanding how to show up in an accountable manner, especially in terms of harm repair and repercussions.



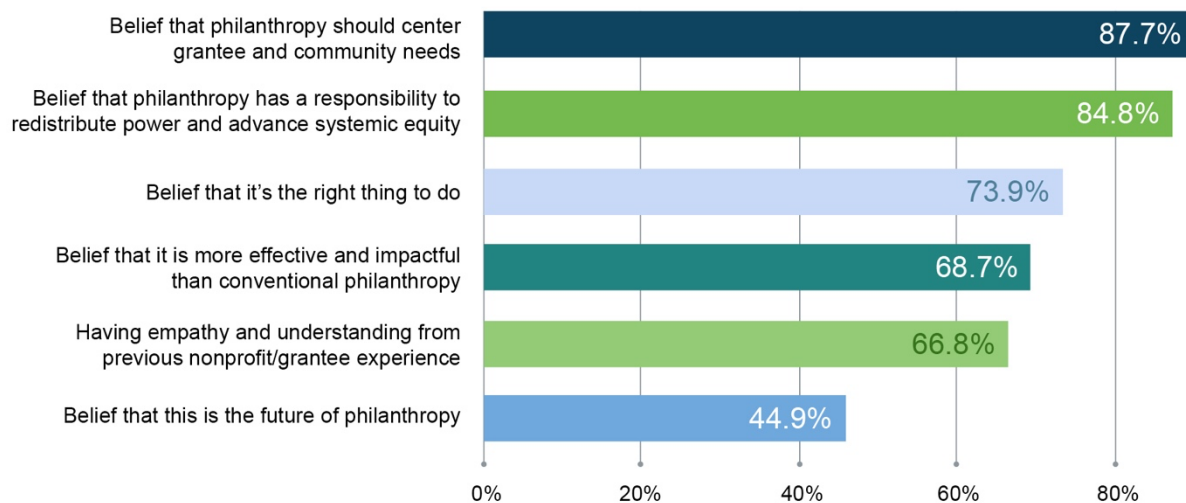
# CONTRIBUTORS

## to Trust-Based Philanthropy Adoption

### Personal Motivations

As noted previously, the vast majority of survey respondents (89%) self-identified themselves as either champions (“I’m a fan and think the sector should embrace it”) or supporters (“I like many or most aspects of the framework”). When prompted to identify what specifically drives this interest, respondents aligned on a variety of answers, and included additional context in the open-ended section.

#### What, if anything, drives your interest in trust-based philanthropy? (Check all that apply)



The top reported motivator – at nearly 90% – was a fundamental belief that philanthropy should center grantee and community needs. The second highest motivator was the belief that philanthropy has a responsibility to redistribute power and advance systemic equity. These findings remained consistent among respondents of various roles at their institutions, which indicates that our most motivated followers are strongly aligned with trust-based philanthropy’s core values of community-centrism and power-shifting.

The qualitative data added context, with nearly one-fifth of the open-ended responses noting their dissatisfaction and frustration with conventional philanthropy. These responses included critiques about the harms caused by conventional philanthropy, the injustices of wealth hoarding, the inability to achieve liberation under restricted circumstances, and frustration with the current models inhibiting the type of changes we need. There were also additional throughlines around the importance of philanthropy demonstrating values alignment with fidelity, and trust-based philanthropy being used as a vehicle for racial equity.

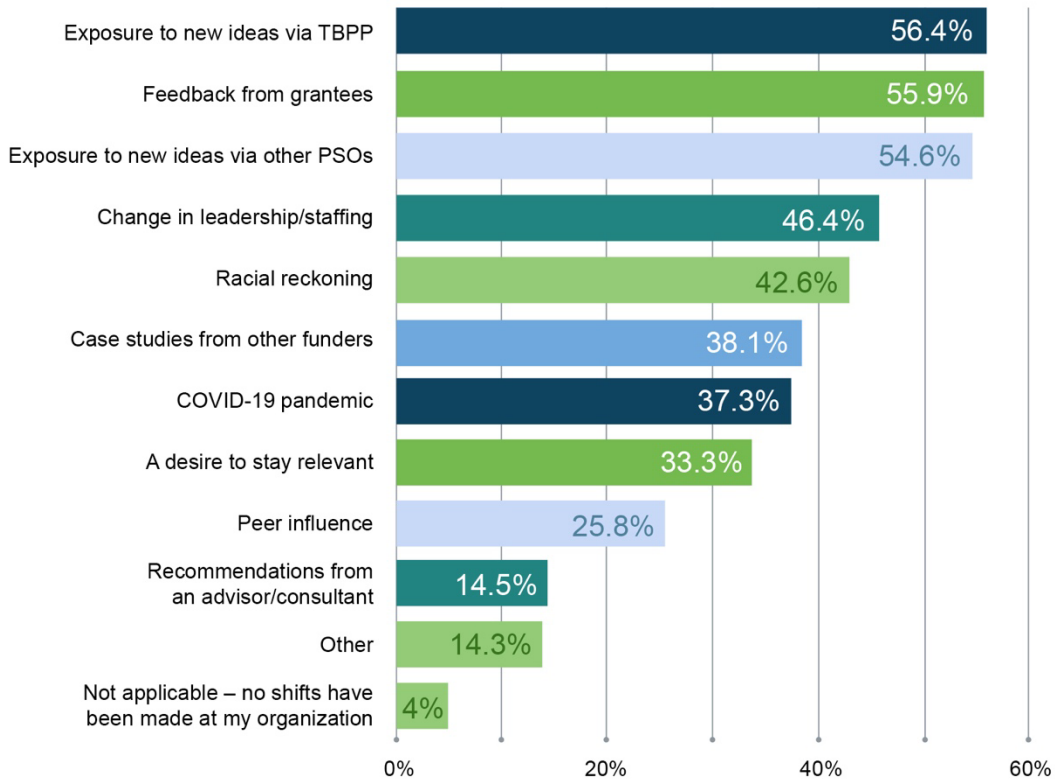
Clearly, many see trust-based philanthropy as a moral imperative for advancing a more just and equitable society.

## Accelerators to Organizational Shift

While personal motivations fuel the work of individuals leading change within their institutions, we also wanted to understand the factors that may be catalysts for organizational change. Similar to last year, we asked those who reported making and sustaining shifts in the last five years what factors they attributed to those changes.

### What factors do you attribute to the shifts that have been made at your organization?

*(Check all that apply)*



Similar to last year, the most cited contributor to organizational change was exposure to new ideas via the Trust-Based Philanthropy Project (56.4%). Feedback from grantees (55.9%) and exposure to new ideas via other funder associations (55%) were also highly cited as contributing factors. This demonstrates that the work of the Trust-Based Philanthropy Project and other philanthropic serving organizations continues to be critical in motivating and supporting organizational change across the sector. It is also promising to see grantee feedback ranking so high as a contributor to organizational change; this both indicates that funders are indeed taking the time to gather grantee feedback, *and* they are acting on feedback in order to make tangible change.

Global factors such as the COVID-19 pandemic and the larger racial reckoning in society were significant influencers in previous years, but as has been reflective in the ebb and flow of larger sector trends, the sector seems to be shifting away from the practices and commitments that were tied to that point in time.

The change in leadership and/or staffing option received a sizable rating of 46%, with many sharing in their open-ended responses that internal changes to decision-making structures helped to accelerate and sustain the shifts needed. Some noted that having new staff and leadership with lived experience and diverse perspectives helped to sustain trust-based changes. These were all noted as significant accelerators.

In the open-ended responses, a frequently-cited factor to organizational change included recent literature and publications, especially as more “philanthropy influencers” make notable contributions to sector discourse. Books such

as *Just Giving*, *Decolonizing Wealth*, and *Winner Take All* were noted, as well as industry publications like the recent Trust-Based Philanthropy supplement in the Stanford Social Innovation Review. Beyond this, a handful of campaigns we re noted as contributors to change, such as Crappy Funding Practices on LinkedIn.

The lowest rated factors included recommendations from consultants or advisors (14.5%), followed by peer influence (25.8%). The data about the low rate of influence from consultants perhaps reinforces a surface-level understanding of trust-based philanthropy, especially since the deeper culture and structure work is usually where consultants can play a more impactful role. This points to an opportunity for consultants to play a more significant and vocal role in the interconnection of trust-based philanthropy and organizational development.

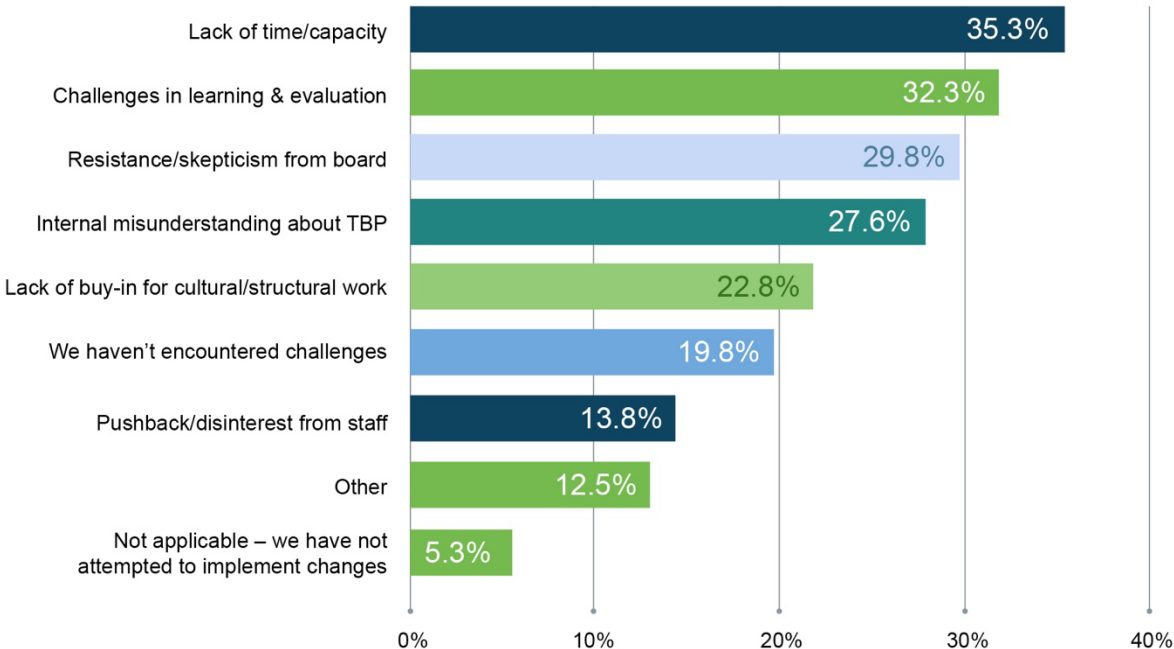
The peer influence finding is particularly interesting, as we’ve noted data discrepancies in previous years where funders do not self-identify as being moved by “peer influence” while repeatedly reporting the benefits of hearing case studies from other funders. This may be simply an issue of semantics, however it does seem to reinforce our observation that there is a general hesitancy among practitioners to formally advocate for trust-based philanthropy. This too presents an opportunity for greater movement building in the future.

### Organizational Hurdles

Of course, making shifts away from conventional norms is not easy, and we strive to support organizations in understanding and overcoming the hurdles that may get in the way. We often hear anecdotal examples of hurdles to operationalizing trust-based philanthropy, so we used the survey as an opportunity to collect some quantitative data about current hurdles. Interestingly, while in the past we have observed board resistance to be consistently noted as the top hurdle to implementation, this data demonstrated a shift.

Notably, the top reported challenge to operationalizing trust-based philanthropy is a general lack of time and capacity to implement effectively (35%). This points to the reality that relationship-building requires time and spaciousness, and many grantmaking organizations are finding it challenging to prioritize the time and space that is needed to learn, cultivate dialogue, and build trust. In addition to this having implications at the deeper cultural level, this barrier also has structural implications, particularly in the way organizations staff and structure their grantmaking roles and administrative responsibilities related to grantee oversight and compliance.

### Have you faced any of the following challenges as you have implemented changes aligned with trust-based philanthropy? (Check all that apply)



Challenges and uncertainty with learning and evaluation emerged as the next highest ranked challenge to trust-based philanthropy implementation, at 32.3%. This is not particularly surprising, especially as more organizations work to reexamine their learning and evaluation practices while still capturing useful information to inform their work. This seems to be an area that would benefit from more examples and tools to support funders of all different kinds in embracing appropriate learning and evaluation models that are right-sized for their scope and objectives.

Notably, one-fifth of respondents reported that they have not encountered *any* challenges with implementing trust-based philanthropy. While this is encouraging to see, it points to a potentially limited understanding of trust-based philanthropy that does not factor in the deeper cultural and structural aspects of the framework. It is also possible that these respondents' organizations are in the earlier stages of a trust-based journey, where they may be more focused on incremental practice shifts that tend to be more easily adopted.

### ***Implications for Trust-Based Philanthropy Project:***

The time/capacity hurdle rising to the top is a notable shift and illuminates a need to lift up more tangible ways to balance the more relational shifts to role functions with streamlining other responsibilities. It also marks an opportunity to partner with key stakeholders, such as consultants and PSOs who work directly with smaller staffed organizations to give more tangible ways to do this work with leaner capacity.



## IMPACT OF TRUST-BASED PHILANTHROPY

Throughout the survey, quantitative and qualitative data revealed various positive impacts practitioners are experiencing by shifting to a trust-based approach. This demonstrates that practitioners of trust-based philanthropy have a desire to communicate and share the benefits they are experiencing, and it points to an opportunity to conduct a broader quantitative assessment of the impacts that are made possible as a result of trust-based philanthropy. Throughout the open-ended sections of the survey, respondents reported many examples of positive impacts, including stronger relationships with grantee partners, greater diversity and representation in their grantee partners, and improved reputation in the communities they serve.

“*Since implementing TBP practices, we have seen a dramatic shift in the proportion of grantee partners that are BIPOC-led.*”

“*Our grantee partners noticed a difference in the way we practice grantmaking from other more traditional foundations and have expressed a great deal of appreciation and respect for a process based on trust.*”

Some respondents also noted that their embrace of trust-based philanthropy had yielded positive impacts for their organizations, including improved culture, more effective and equitable operations, and increased demographic focus in various forms of diversity metrics and lived experiences.

These impacts lift up the benefits to making these shifts, and reinforce the notion that although time and capacity hurdles are a significant barrier, it is worth the commitment to making these changes, as it improves external and internal operations, organizational health, and relationships.



# OPPORTUNITIES MOVING FORWARD

2025 and Beyond

## For Our Internal Work

After five years of movement-building and field organizing, the Trust-Based Philanthropy Project is now embarking on a new chapter with a more focused goal of establishing trust-based philanthropy as the standard of practice for philanthropies committed to a just and equitable society. The findings in this report affirm some of our plans already underway, while offering additional insight and context that will allow us to refine and strengthen our efforts moving forward. We are also bolstered by the positive feedback from practitioners who have found so much value in our work over the years. It affirms our intent to continue our work into 2025 and beyond.

*These survey results have illuminated the following priorities for our work moving forward:*

### **Reinforce a holistic understanding and adoption of trust-based philanthropy:**

There is clearly a need to establish a deeper understanding of this multi-dimensional and nuanced approach among foundations and donors, as well as among the organizations and individuals who serve and support them. Across our communications, programming, and resources, we will continue clarifying the framework as a holistic cultural and structural approach rooted in an ethos of power-consciousness, collaboration, and humility. Given the long-term and sometimes abstract nature of the deeper cultural and structural work, the field would benefit from tools that break down abstract concepts into practical steps toward cultural and structural transformation. We will develop and promote clear, tangible actions that can support foundations interested in strengthening their work internally as part of their trust-based philanthropy journeys. We can also support this goal by deepening our collaborations with philanthropy membership organizations and organizational development practitioners who can bring the knowledge and embodiment of trust-based values into their work with organizations on the change journey. This work is already in development as part of our next phase of growing the trust-based philanthropy movement.

### **Support continued, deeper networking for funders on the TBP journey:**

This year's data, alongside the data from previous years, indicates good momentum toward the adoption and sustainment of trust-based practices that reduce burdens on nonprofits. This is very encouraging, however there is still more work to be done to better address the deeper power imbalances and systemic inequities that still permeate the sector. After all, even when funders provide unrestricted funding and streamlined applications, they can still wield their power and cause unintended harm in other ways.

To advance a deeper understanding and commitment to addressing harmful power dynamics, we will facilitate intentional peer learning opportunities for funders on the trust-based journey. Our experiments may include structured engagements for connection and dialogue within the Trust-Based Philanthropy peer listserv (such as regular meetups and discussion prompts to invite reflection and sharing), as well as in-person networking opportunities at industry conferences where funders can come together and discuss strategies to hold them accountable to the core values of trust-based philanthropy. We will ensure that these networking opportunities prominently feature case studies from those who have operationalized trust-based philanthropy across the multiple dimensions (culture, structures, leadership, practices) and who have learned helpful lessons that can support others in their journeys.

### **Catalyze commitment and advocacy among trust-based practitioners:**

Since our inception, the Trust-Based Philanthropy Project has relied on the power of funder-to-funder organizing to help grow the movement. As we seek to deepen understanding and holistic adoption of trust-based philanthropy, it is clear that funders who publicly identify as trust-based and hold themselves accountable to TBP values will play an important role. Not only can these funders model the ethos of trust-based philanthropy among their peers, they also

can be helpful messengers in addressing misperceptions and inspiring adoption among those who are skeptical or unfamiliar. We can support more funder-driven advocacy by: a) encouraging trust-based funders to speak up about the benefits and impacts of this approach, b) creating opportunities for funders to share their lessons and challenges in operationalizing the approach, and c) disseminating peer organizing tips to help motivated funders take action steps toward engaging their peers.

### **Explore and address reluctance around the trust-based philanthropy “label”:**

The survey data revealed that even among funders that embrace trust-based practices, there is hesitance to claim the label publicly. For some, this stems from a reluctance to seem self-promotional or self-congratulatory; for others, it feels disingenuous to use the label when they are not yet “fully” trust-based. While this hesitancy is understandable, we believe it presents a missed opportunity to spark dialogue and awareness around trust-based philanthropy. We’d like to better understand the underlying factors behind this reluctance, and explore ways to activate these funders to translate their support of trust-based philanthropy toward more public-facing communication and advocacy.

### **Document and disseminate examples of trust-based philanthropy’s impact:**

While the survey revealed a host of impacts that have been made possible as a result of trust-based philanthropy, there is still limited fieldwide data on the impact of this approach across the sector. As one respondent noted,

*“The more TBP Project can equip trust-based champions with quantitative data on positive outcomes of TBP, the easier it will be for people to change the hearts and minds of those clinging to outdated models. We don’t need to water anything down to make those folks accept TBP, but there needs to be a bridge for them to cross over.”*

We agree this data could be particularly influential in reaching and engaging funders who may be skeptical or hesitant to embrace this approach. We see opportunities to explore a multi-year, sectorwide study to document and disseminate the various impacts that are possible as a result of trust-based philanthropy. Plans are already in development for research to begin in 2025.

### **Deploy narrative strategies to reinforce values of power-shifting and community-centrism:**

We are struck by the recurring themes throughout the survey findings: the importance of shifting power, listening to communities, and prioritizing relationships to advance equity. These values are core to a range of power-shifting efforts in philanthropy right now (e.g., decolonizing wealth, participatory grantmaking, equitable evaluation, solidarity philanthropy, reparative action), and there is an opportunity to foster greater narrative alignment among us in order to create a bigger and louder megaphone in support of our shared goals. While we as a Project are committed to advancing knowledge of trust-based philanthropy specifically, there is also tremendous value in promoting a broader narrative that reinforces the essential role of community self-determination in achieving a more equitable world.

Ultimately, we are bolstered by the findings in this survey – as an affirmation of our efforts over the last five years, as well as an illumination of how we can focus our efforts for our next five. We have clearly established a solid foundation for the trust-based philanthropy movement and are now poised to build upon that momentum to ensure that this becomes the standard of practice for all philanthropies committed to a just and equitable society.

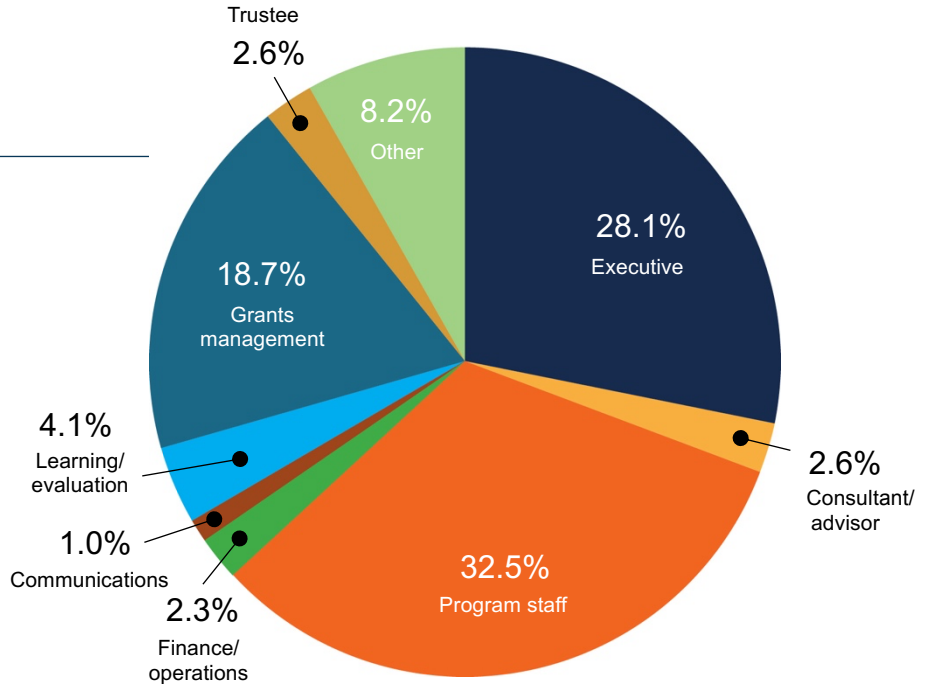
*“I’m grateful to TBP for the field building & education work you’ve done, and consider it a step forward, and a powerful invitation for new and established donors. So thank you! Because you exist, I get to present the big idea in the rooms I move through, and then point people to you for deeper dives.”*



# Appendix A: Respondent Demographics

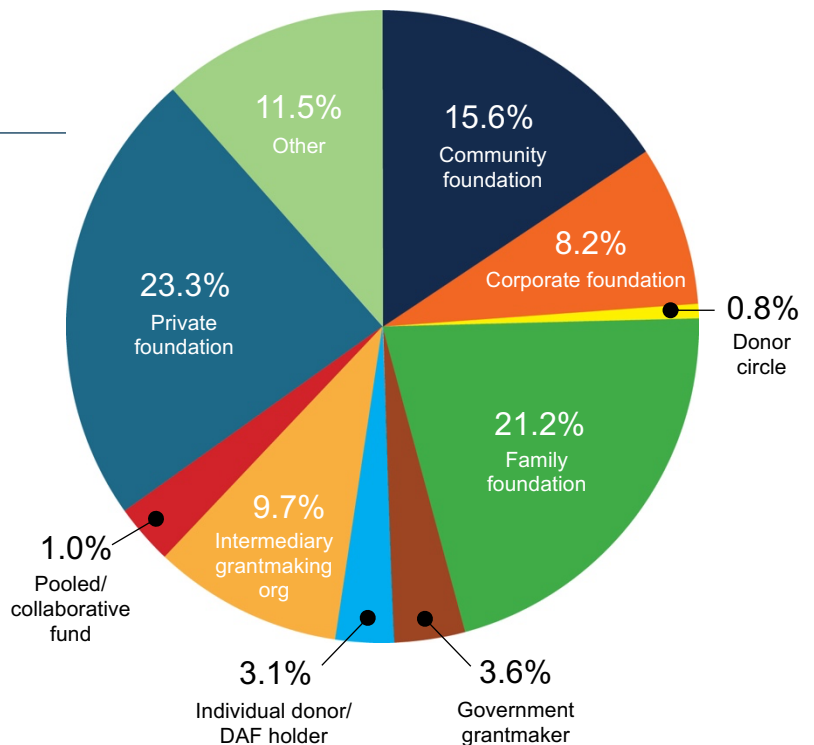
## PROFESSIONAL ROLE

- Program staff – 32.5%
- Executive – 28.1%
- Grants management – 18.7%
- Other – 8.2%
- Learning/evaluation – 4.1%
- Consultant/advisor – 2.6%
- Trustee – 2.6%
- Finance/operations – 2.3%
- Communications – 1%
- HR – 0.0%



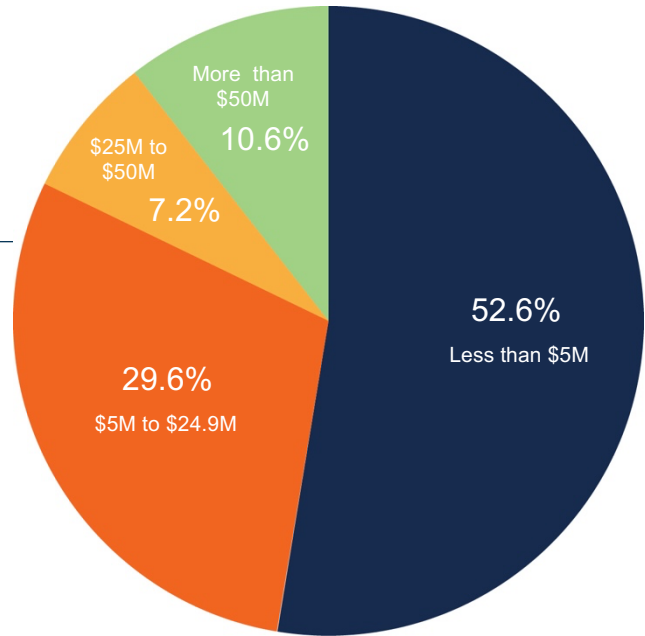
## ORGANIZATION TYPE

- Private foundation – 23.3%
- Family foundation – 21.2%
- Community foundation – 15.6%
- Other – 11.5%
- Intermediary grantmaking org – 9.7%
- Corporate foundation – 8.2%
- Government grantmaker – 3.6%
- Individual donor/DAF holder – 3.1%
- Pooled/collaborative fund – 1%
- Donor circle – 0.8%



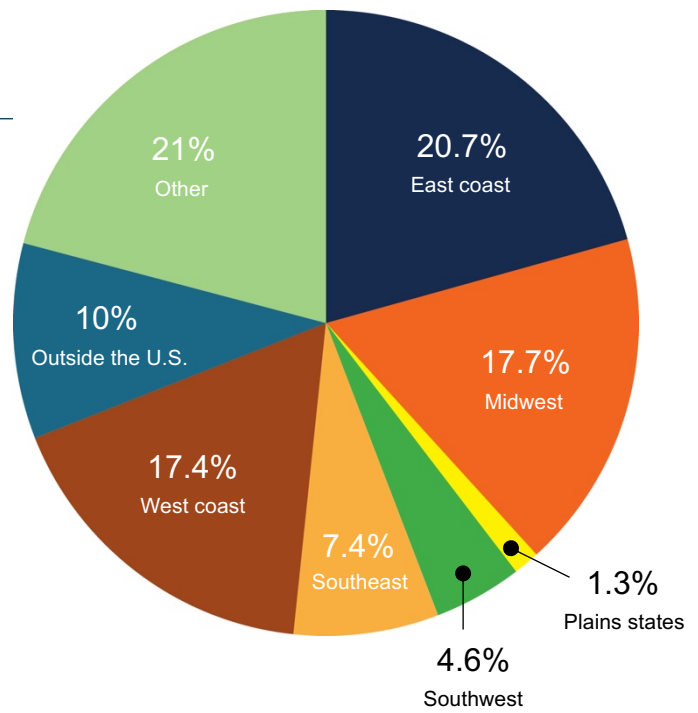
## ANNUAL GRANTMAKING/ GIVING BUDGET

- Less than \$5M – **52.6%**
- \$5M to \$24.9M – **29.6%**
- More than \$50M – **10.6%**
- \$25M to \$50M – **7.2%**



## GEOGRAPHIC LOCATION

- Other – **21%**
- East coast – **20.7%**
- Midwest – **17.7%**
- West coast – **17.4%**
- Outside the U.S. – **10%**
- Southeast – **7.4%**
- Southwest – **4.6%**
- Plains states – **1.3%**





## Appendix B: Survey Questions

**Thank you for participating in the Trust-Based Philanthropy Project’s 2024 grantmaker survey. Our goal is to assess the adoption of trust-based practices, understand field-wide perceptions related to trust-based philanthropy (TBP), and gauge the barriers and impact of employing a trust-based philanthropy framework. We will use your feedback to inform our future strategies.**

**Please note that this survey is only intended for donors, grantmakers, and staff of grantmaking organizations - regardless of your orientation to and familiarity with the trust-based philanthropy framework. You are not required to limit responses to one person per organization; multiple responses per organization are acceptable.**

**As a token of gratitude, we will be raffling off a 1-hour TBP coaching session to those who complete this survey (you will get the link to put your information down at the end of this survey for that raffle).**

**This survey will be open from Wednesday, July 10th through Monday, August 26th and should take approximately 10 minutes to complete. Your responses will remain entirely anonymous. Thank you again for your time.**

For your convenience, please find a list of the survey questions below:

- We welcome respondents from various TBP stages. Regardless of your level of familiarity, in one to two sentences, how would you define or describe trust-based philanthropy?
- What is the best characterization of your personal stance on trust-based philanthropy?
- What, if anything, drives your interest in trust-based philanthropy?
- Which of the following actions has your organization/institution implemented and sustained in the last five years?
- Have you reexamined your learning and evaluation to be more trust-based, equitable, and/or grantee-centric?
- How much of your funding is currently unrestricted AND multi-year?
- Has your organization made any shifts to hold itself more accountable as a funder?
- What factors do you attribute to the shifts that have been made at your organization?
- Have you faced any of the following challenges as you have implemented changes aligned with trust-based philanthropy?
- Does your organization identify as being trust-based, or doing “trust-based philanthropy”?
- Would you say you have a trust-based board/advisory committee?
- What qualities does your board/advisory committee exhibit/prioritize?
- Do you have any other comments or thoughts about trust-based philanthropy that you would like to share?
- Race/ethnicity: Which of the following best describes how you identify?
- Which of the following best describes your role within your organization?
- Which of the following categories best describes the type of grantmaking organization you represent?
- What is your annual grantmaking/giving budget?
- Which of the following regions best describes your location?

**\* 1. Are you a donor, grantmaker, or staff/board member of a grantmaking institution?**

- Yes
- No

**2. We welcome respondents from various TBP stages. Regardless of your level of familiarity, in one to two sentences, how would you define or describe trust-based philanthropy?**

**\* 3. What is the best characterization of your personal stance on trust-based philanthropy (TBP)?**

- I don't know enough about it to answer this question
- Opposed - this framework/term is not aligned with my personal preferences
- Indifferent - I'm not opposed or subscribed, it is not a priority for me
- Skeptical - I'm unsure about aspects of the framework
- Curious - I have heard about TBP and want to learn more
- Supportive - I like many or most aspects the framework
- Champion - I'm a fan and think the sector should embrace it

**\* 4. What, if anything, drives your interest in trust-based philanthropy? (Check all that apply)**

- I believe it's the right thing to do
- I have empathy and understanding from previous nonprofit/grantee experience
- I believe it is more effective and impactful than conventional philanthropy
- I believe this is the future of philanthropy, based on what I'm hearing and seeing
- I believe philanthropy has a responsibility to redistribute power and advance systemic equity
- I believe philanthropy should center grantee and community needs
- Other (please specify)

**\* 5. Which of the following actions has your grantmaking organization/institution implemented and/or sustained in the last five years? (Check all that apply)**

- Streamlined application processes (e.g., accepting proposals written for other funders or reducing the number of questions)
- Streamlined reporting processes (e.g., switching to verbal reporting or accepting annual reports in lieu of grant reports)
- Introduced and/or increased multi-year grants
- Introduced and/or increased unrestricted grants
- Improved transparency and responsiveness to grantees and prospective grantees
- Made shifts to proactively “do the homework” on prospective grantees in the pre-proposal stages
- Used feedback from grantees to inform our grantmaking process and/or strategies
- Instituted support “beyond the check” for grantee organizations (e.g., capacity building support, connecting grantees with other funders/grantees/resources, etc.)
- Reexamined organizational structures (e.g., grant agreements, job descriptions, grants management system) to better align with our values
- Conducted internal assessment and work to improve organizational culture
- Conducted a racial equity audit (including racial equity trainings, consulting, etc.) to assess and improve our organization’s racial equity work (internally and/or externally)
- We have not taken any relevant actions
- We have taken other actions that are aligned with trust-based philanthropy (please specify)

**\* 6. Have you reexamined your learning and evaluation to be more trust-based, equitable, and/or grantee-centric?**

- Yes
- No
- Unsure

Please provide context to your answer:

\* 7. 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

\* 8. Has your organization made any shifts to hold itself more accountable as a funder?

- Yes
- No
- Unsure

Please provide context to your answer:

\* 9. What factors do you attribute to the shifts that have been made at your organization?  
(Check all that apply)

- Not applicable - no shifts have been made at my organization
- COVID-19 pandemic
- Racial reckoning in the sector/society
- Change in leadership and/or staffing
- Feedback from grantees
- Exposure to new ideas via Trust-Based Philanthropy Project
- Exposure to new ideas via other philanthropic member organizations and/or funder associations
- Recommendations from a philanthropic advisor/consultant
- Hearing examples and case studies from other funders
- Peer influence, i.e., direct encouragement from other funders
- A desire to keep up with sector priorities and field-level trends
- Other (please specify)

**\* 10. Have you faced any of the following challenges as you have implemented changes aligned with trust-based philanthropy? (Check all that apply)**

- Not applicable - we have not attempted to implement changes aligned with trust-based philanthropy
- Resistance or skepticism from the board
- Lack of time/capacity to implement effectively
- Internal misunderstanding about trust-based philanthropy
- Lack of buy-in for the necessary cultural and structural work
- Pushback or disinterest from staff
- Challenges/uncertainty in applied learning and evaluation
- We haven't encountered challenges in implementing trust-based changes
- Other

Please provide context to your answer:

**\* 11. Does your organization identify as being trust-based, or doing “trust-based philanthropy”?**

- Yes - we acknowledge it publicly
- Yes - we acknowledge it internally
- Mixed/Undecided - it varies depending on who you ask
- No - even though many of our values and practices are aligned
- No - we do not employ trust-based philanthropy
- Other

Please provide context to your answer:

**\* 12. Would you say you have a trust-based board/advisory committee?**

- Yes - the entire board/advisory committee is trust-based
- Some individuals on the board/advisory committee are trust-based
- No, our board/advisory committee is not trust-based
- Unsure
- Not applicable

Please provide context to your answer:

**\* 13. What qualities does your board/advisory committee exhibit or prioritize? (Check all that apply)**

- They model humility and empathy
- They are open to feedback
- They prioritize grantee perspectives
- They strive to learn from the communities we serve
- They aim to be mutually accountable
- They place a high level of trust in staff
- They believe trust-based philanthropy is the right thing to do
- Not applicable
- Other

Please provide context to your answer:

**14. (Optional) Do you have any other comments or thoughts about trust-based philanthropy that you would like to share?**

15. Race/ethnicity: Which of the following best describes how you identify? (Check all that apply)

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

\* 16. 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)

\* 17. Which of the following categories best describes the **type of grantmaking organization** you represent?

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

18. What is your annual grantmaking/giving budget?

- Less than \$5M
- \$5M to \$24.9M
- \$25 to \$50M
- More than \$50M

\* 19. Which of the following regions best describes your **location**?

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

**Thank you for completing this survey! Please be sure to sign up for the Trust-Based Philanthropy Project newsletter to receive a report on our findings later this year.**

**If you are interested in being entered into the raffle to receive a 1-hour trust-based philanthropy coaching session, you can enter your information here.**