



Demystifying Trust-Based Philanthropy

What Does Grantee Accountability Look Like in Trust-Based Philanthropy?

Wednesday, June 14 2023

12:00-2:00 pm PT / 3:00-5:00 pm ET

Welcome! We'll get started 3 minutes in, to give people space to transition in smoothly.



trust-based
philanthropy
project



Meeting Housekeeping

- Please keep your microphones muted
- Use the chat box for questions, comments, and dialogue
- Ensure you are using the most recent version of Zoom
- Accessibility- utilize the CART transcription
- The session will be recorded for future reference
- Join us on social media- #DemystifyingTBP

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Series Outline: Demystifying Trust-Based Philanthropy

- ~~1. Does Trust-Based Philanthropy Mean Unconditional Trust? (April 19)~~
- ~~2. Does Unrestricted Funding *Automatically* Make a Funder Trust-Based? (May 11)~~
- ~~3. How Do We Approach Risk and Due Diligence in Trust-Based Philanthropy? (May 31)~~
- 4. What Does Grantee Accountability Look Like in Trust-Based Philanthropy? (June 14)**
5. What Does Evaluation Look Like in a Trust-Based Context? (July 12)
6. What Does Racial Equity Have To Do With Trust-Based Philanthropy? (August 2)





Today's Agenda

- **Opening**
- **Grounding Context**
- **Panel Discussion**
- **PSO Breakout Discussions**

- Arizona Alliance
- Connecticut Council for Philanthropy
- Council of New Jersey Grantmakers
- Florida Philanthropic Network
- Forefront Illinois
- Grantmakers Council of Rhode Island
- Grantmakers for Effective Organizations
- Grantmakers in Aging
- Grantmakers of Western Pennsylvania
- Indiana Philanthropy Alliance
- Maryland Philanthropy Network
- National Center for Family Philanthropy
- Philanthropy California
- Philanthropy Colorado
- Philanthropy Missouri
- Philanthropy New York
- Philanthropy Northwest
- Philanthropy Ohio
- NY Funders Alliance

Thank you to our philanthropy-serving organization partners!



Trust-Based Philanthropy

- ❖ *A values-driven approach* that addresses the inherent power imbalances between funders, nonprofits, and communities
- ❖ Is centered on the belief that funders play a critical role in *redistributing resources and power* toward advancing a healthier, more equitable, and more democratic society
- ❖ Flips the script on conventional philanthropy by prioritizing *relationships and mutual learning over transactions and top-down accountability*

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6 Grantmaking Practices of TBP

Give Multi-year, Unrestricted Funding

Do the Homework

Simplify & Streamline Paperwork

Be Transparent & Responsive

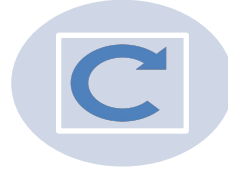
Solicit & Act on Feedback

Offer Support Beyond the Check

A Values-Based Approach



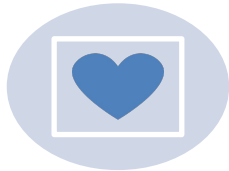
**WORK FOR
SYSTEMIC EQUITY**



**REDISTRIBUTE
POWER**



**CENTER
RELATIONSHIPS**



**PARTNER IN A
SPIRIT OF SERVICE**



**MUTUAL
ACCOUNTABILITY**



**EMBRACE
LEARNING**

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Opening Poll



Grounding Context
What Does Grantee Accountability
Look Like in Trust-based
Philanthropy?





What does trust-based accountability look like?

- There **should** be accountability in a trust-based funder-grantee relationship.
- As in any strong, healthy, relationship, accountability should be **mutual** rather than top-down.
- Consider accountability to grantees and the communities they serve.

Why accountability should be mutual

- Mutual accountability helps to rightsize the power imbalance between funders and grantseekers.
- Mutual accountability acknowledges the mutually beneficial relationship.
- Mutual accountability helps funders to be better partners to their grantees.
- Mutual accountability helps funders reduce bias and operate more equitably.






Funder Accountability



Shifting to a more trust-based approach will not reduce accountability



The arduous conventional grantmaking practices are not accurate accountability measures



**“How do we know
that grantees will do
what they say they
will do?”**

1. Do the homework
2. Build the relationship
3. Follow their work
4. Support them
5. **Trust them**

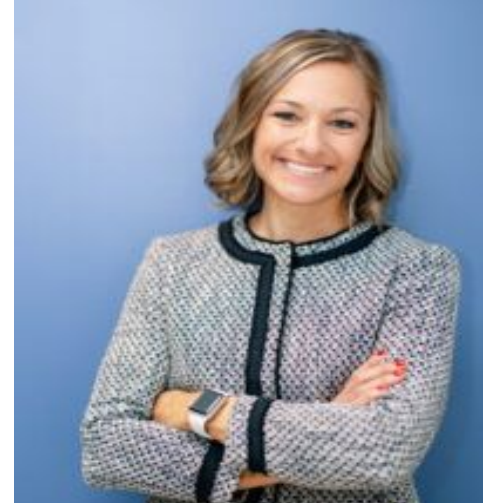
Panelist Discussion



Lorrie Fair Allen
Chief Program Director
Charlize Theron Africa
Outreach Project



**Dr. Meredith
Shockley-Smith**
Executive Director
Cradle Cincinnati



Jill Miller
President & CEO
Bethesda Inc. and bi3

What Does Grantee Accountability Look Like in Trust-based Philanthropy?



Key Takeaways

- A trust-based accountability approach prioritizes **mutual** accountability.
- Mutual accountability helps to rightsize power imbalances and build stronger funder-grantee relationships.
- Multi-layered accountability considerations is key: funder-grantee-community.
- Conventional grantmaking practices don't elicit better accountability; trust-based accountability leads to better relationships, transparency, and accountability.

Closing poll





Breakout discussions

Please join the breakout room of the philanthropy-serving organization you are affiliated with.

If you are not affiliated with a philanthropy-serving organization, please stay here in for the main room for the breakout discussion.

- Thank you for your participation!
- Please complete the evaluation
- Recording and resources to be shared

See you at the next session, “What Does Evaluation Look Like in a Trust-Based Context??” on July 12th, 3-5pm ET