ROADMAP TO TRUST-BASED TRANSFORMATION

Key milestones on the trust-based philanthropy journey

While the exact pathways for becoming a trust-based foundation are not necessarily linear or identical across organizations, there are common milestones to consider along any trust-based philanthropy (TBP) journey. This is a snapshot of some of those key milestones and how they connect to your organizational culture, structures, leadership, and practices. As you embark on the journey – and regardless of how far along you may be – you will find that much of this work is iterative, requiring continual learning and refinement.

Awareness	Assessment	Institutional Transformation	Operationalize TBP Practices	Learn, Evaluate, Reflect	Re-Evaluate	Peer Networking & Advocacy
• Board and staff learn what it means to be a trust-based organization. • Board and senior leaders agree on core values – and commit to implementing TBP practices and values across the organization.	• Key staff review and assess org strategy, structures, protocols, and policies to ensure that they express trust-based values and reflect the mission. • Senior leaders examine and repair the ways structural racism shows up in any structures. • Staff, grantee partners, and vendors are invited to provide feedback.	• Clarify key areas of transformation; establish internal team; create a realistic timeline. • (Re)formulate foundation's strategy with a lens of community accountability. • Develop clear comms about expected shifts and how they reinforce equity & accountability. • Use core values to determine how different departments will align on goals. • Keep board & staff engaged, encourage co-ownership.	• Implement new policies and procedures *(GMS, job descriptions, evaluation systems, contracting, etc.)* • Design feedback loops with stakeholders to inform iterative change. • Operational changes start to reflect TBP values.	• Shift data systems to prioritize self-reflection, emergent learning, and accountability to grantee partners. • Encourage ongoing learning discussions among board, staff, and grantee partners. • Talk less and listen more.	• Use the TBP Self-Reflection Tool to re-assess grantmaking practices, culture, structures, and leadership against your values and make adjustments.	• Staff and board reflect and share knowledge and learnings with peers committed to TBP. • Staff and board become informed advocates for TBP.

trust-based philanthropy project

Special thanks to Mynor Veliz and Headwaters Foundation for conceptualizing this roadmap. This is a high-level map rather than a comprehensive step-by-step guide. For more specific tools that align with your priority milestones, visit:
www.trustbasedphilanthropy.org/resources