

# Evaluation in a trust-based context

Is there a role for evaluators?

Unpacking the *Trust-Based Philanthropy Project Webinar* [Demystifying Trust-Based Philanthropy, Session 5](#)  
with the West Michigan Evaluators Network

# Evaluation in a trust-based context

It's far too complicated  
to explain, so you'll  
have to trust me.



But I don't  
trust you.



freshspectrum

# Evaluation in a trust-based context

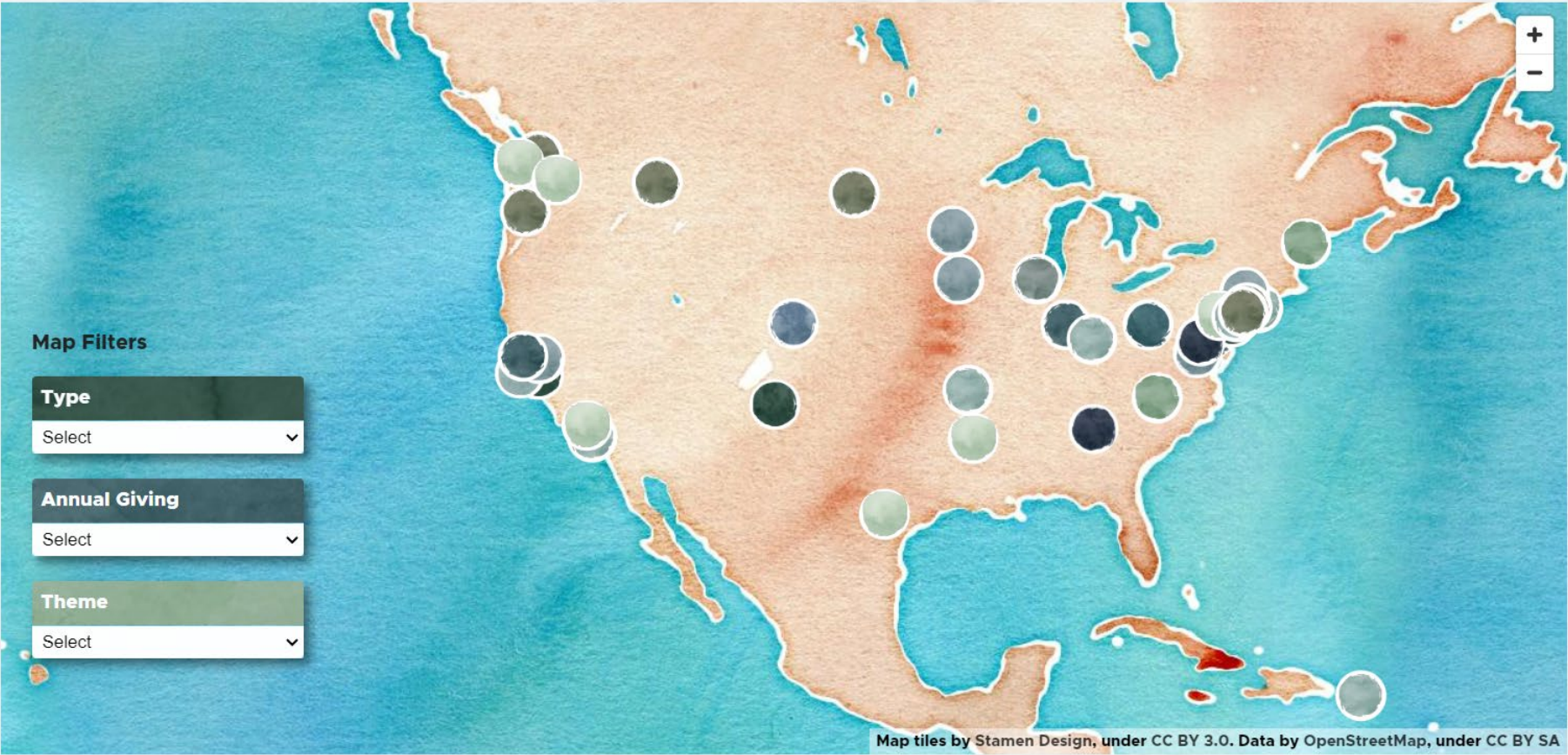
- Why care about Trust-Based Philanthropy (TBP)?
- Overview of TBP
- Key takeaways on evaluation in TBP (for me)
- Discussion

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- **Why care about Trust-Based Philanthropy (TBP)?**
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We are in the midst of a sector-wide shift toward trust-based philanthropy, with more and more funders confronting the way our sector has contributed to and continues to reinforce systemic inequities. Momentum is growing, and there is power in making the transformation of this network visible to itself.



# Why care about TBP?

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## Breakout Session at the Council of Michigan Foundations Conference: Exploring Trust-Based, Equity-Driven Practices

Wednesday, November 8, 2023

11:30 AM – 12:45 PM

Detroit Renaissance Center  
400 Renaissance Drive West, Detroit, MI, 48207, United States ([map](#))

This in-person breakout session “Exploring Trust-Based, Equity-Driven Practices” is part of the [Council of Michigan Foundations Conference](#) happening November 6-8, 2023 in Detroit, Michigan. Registration is required.

There is a values-to-practice gap in traditional philanthropy. Many foundations are driven to build community, advance equity and increase opportunity – however, our sector’s most common grantmaking practices often do not reflect those values.

In this session, we will dig deep into values. We will take some time to discuss trust-based values and reflect on the ways that those values can show up in our individual roles as well as what happens when your practices aren’t aligned with your values. Together, we will brainstorm small steps you can take in your current role and discuss how those changes can lead to meaningful shifts in philanthropy. You will engage in discussion with your peers about the values-to-practice gap and walk away with concrete ideas on how to align practices to values. If you’re ready to explore trust-based, equity-driven practices that show up at every level in a foundation, this is the session for you.

### Speakers

- Jill Miller, President & CEO, [Bi3](#)
- Danielle LaJoie, Sr. Manager of Partnerships & Programming, [Trust-Based Philanthropy Project](#)

[REGISTRATION](#)

# Why care about TBP? Values!

- Work for systemic equity
- Redistribute power
- Center relationships
- Partner in the spirit of service
- Be accountable
- Embrace learning

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# Overview of TBP



# Overview of TBP: Practices

- Give multi-year unrestricted funding.
- Do the homework.
- Simplify and streamline paperwork.
- Be transparent and responsive.
- Solicit and act on feedback.
- Offer support beyond the check.

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# Evaluation in TBP

Compliance,  
monitoring and  
proving-based  
reporting



**Collaborative learning**

# Evaluation in TBP: Alternative ways to capture learnings... *why?*

- To reduce grantee burden
- To demonstrate trust and humility
- To build stronger, deeper relationships
- To gain a bigger picture understanding of the issues
- To listen for ways to support grantees' impact goals

# Evaluation in TBP: Alternative ways to capture learnings...*how?*

- Put onus on funder staff
- Reduce / eliminate narrative reporting requirements – consider what isn't necessary
- Implement alternative methods (oral reporting, focus groups, videos)
- Recognize the value of stories as data
- Check for understanding and alignment

# Evaluation in TBP: Headwaters Foundation

## 3 Pillars of Learning & Evaluation

Learning for...	Key Questions	Frequency
Accountability	<ul style="list-style-type: none"><li>→ How well are we living into our values?</li><li>→ Do our partners trust and value our support?</li></ul>	Quarterly
Decision Making	<ul style="list-style-type: none"><li>→ How well are we supporting our nonprofit partners in achieving their goals?</li><li>→ How well are we strengthening the nonprofit ecosystem?</li></ul>	Yearly
Long-Term Impact	<ul style="list-style-type: none"><li>→ What changes are we seeing in policies, practices, and systems over time?</li><li>→ How can partners help us interpret and act given these long-term data?</li></ul>	5-10 years

Adapted from this webinar and <https://www.trustbasedphilanthropy.org/resources-articles/tbp-cei-learning-evaluation-framework>;  
See also this foundation's 2022 *Evaluation and Learning Data Book*.

# Evaluation in TBP: Satterberg Foundation

## Early Experience

### CHANGES

1. Eliminated written report
2. Slowed pace and promoted reflection
3. Realized changes in foundation infrastructure needed



### RESULTS

1. Yearly check-ins
2. Included time for deeper consideration of community needs, staff sabbaticals = appreciated by staff and identified new community priorities, e.g. own homes
3. Need to decrease # foundations per program staff



# Evaluation in TBP: American Jewish World Service

## Structural Shifts

- Grants management system simplified, with burden of information gathering moved to staff (vs. grantees)
- Internal evaluation and program teams form deep partnership
- Decision making on awards and leadership on grantee and accompaniment and learning to local staff
- Happens in pieces/steps

# Evaluation in TBP

“We don’t have to give up rigor to live into our values.”

- Brenda Solorzano, CEO, Headwaters Foundation (2023)

# Evaluation in TBP

You say your program works but why should I believe you?



Because I have evidence.



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# Discussion

## My lingering questions:

1. How will foundations “staff-up” vs. hire consultants to carry out related collaborative learning tasks?
2. Will grantee learning and evaluation capacity be addressed?
3. Will adequate resources (budgets, staff time) be dedicated to TBP related shifts?
4. To what extent are government funders considering trust-based approaches, or not?
5. How should we position ourselves, as evaluators, to build relationships that fit well in a trust-based ecosystem?
6. How do associated grantees need to prepare to capture other sources of funding if/when the trust-based funding ends?

**What are YOUR questions, comments, concerns???**



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