



# SELF-REFLECTION TOOL

Simply Secure | License: CC BY 4.0  

Adapted from Trust-based Philanthropy

## Are you creating a harmful power dynamic?

- For each one of these statements, please answer **“Yes”**, **“Trying, but not there yet”**, or **“No”**.
- Give yourself a 2 for every **“Yes”**, a 1 for every **“Trying, but not there yet”**, and a 0 for every **“No”**.

### Part 1. Grantmaking Practice

	Yes	Trying, but not there yet	No
• We give multi-year grants.	.....	.....	.....
• Our grant application process requires less time and effort than the average process.	.....	.....	.....
• We don't have strict deadlines for our funding programs	.....	.....	.....
• Our practices are continually informed by feedback from grantee partners and community members.	.....	.....	.....
• We are transparent with prospective and current grantees about our funding priorities and decisions.	.....	.....	.....
• When reporting, we only request the information we need from grantees, via methods they can easily access.	.....	.....	.....
• We respond to calls and emails from grantees and prospective grantees within 1-3 working days.	.....	.....	.....
• We “keep ourselves honest” by using external partners for evaluation.	.....	.....	.....
• We do the homework and put the onus of due diligence on ourselves rather than the grantees.	.....	.....	.....
• We carefully read everything that grantees send to us.	.....	.....	.....
• We have a streamlined reporting process that does not require grantees to report on every detail of what they did with the grant money.	.....	.....	.....
• We offer our grantee non-financial support such as: facilitating capacity building workshops, providing access to relevant resources, introductions to other funders, et cetera.	.....	.....	.....
• Our grantee applicants are reviewed by staff members and an advisory board that is made up of trusted community members.	.....	.....	.....
• We integrate threat modeling and risk assessment into our funding program design.	.....	.....	.....
• We conduct accessibility and security assessments throughout our grantmaking process.	.....	.....	.....
• We work with the community to co-design a meaningful definition of success rather than fixed, vanity metrics.	.....	.....	.....
• We encourage applicants to submit their applications and proposal in their native languages.	.....	.....	.....
• Our funding platform, including our application form, is available in multiple languages.	.....	.....	.....
<b>TOTAL</b>	.....	.....	.....

## Part 2. Leadership

Part 2. Leadership	Yes	Trying, but not there yet	No
• Our board is comprised of people that have their own experience of being an applicant/grantee.	.....	.....	.....
• Our board is guided/shaped by humility, empathy, and vulnerability.	.....	.....	.....
• Our board practices model, honest, and transparent communication.	.....	.....	.....
• Our board creates a climate where all questions and ideas are welcome	.....	.....	.....
• Our board places a high level of trust in our executive leadership and staff’s decision-making.	.....	.....	.....
• Our board’s role is predominantly focused on guiding our big picture strategies and endowment (rather than approving grants or reviewing dockets).	.....	.....	.....
• Our board represents or engages with the perspectives of the communities we seek to serve.	.....	.....	.....
• Our board is open to new possibilities and transformation, even when they are difficult or threatening.	.....	.....	.....
• Our executive staff demonstrates humility, empathy, and vulnerability.	.....	.....	.....
• Our executive staff places a high level of trust in the staff’s decision-making.	.....	.....	.....
• Our executive staff practice open, honest, and transparent communication.	.....	.....	.....
• Our executive staff is not afraid to admit failure and learn from mistakes.	.....	.....	.....
TOTAL	.....	.....	.....

## Part 3. Culture

Part 3. Culture	Yes	Trying, but not there yet	No
• We have a culture of seeking and providing honest feedback among staff.	.....	.....	.....
• We block time for dialogue, reflection, and learning among staff on a regular basis.	.....	.....	.....
• We block time for difficult conversations about power, privilege, and equity on a regular basis.	.....	.....	.....
• Our staff understands how the philanthropy sector has historically contributed to and benefited from systemic inequities.	.....	.....	.....
• We are open to new possibilities and transformation, even when they are difficult or have potential risks.	.....	.....	.....
• We acknowledge and respect grantee partners as experts in their work.	.....	.....	.....
• We give grantee partners agency over their projects.	.....	.....	.....
• We have diversity, equity, and inclusion (DEI) policy in place.	.....	.....	.....
• We dedicate time and space for grantee partners to open up to us about their needs and challenges.	.....	.....	.....
• Our approach to evaluation is focused on learning and growth rather than on holding grantee partners accountable to impact metrics.	.....	.....	.....
• We invest in staff training programs on subjects such as diversity, equity, cross-cultural communication, racism, et cetera.	.....	.....	.....

### Part 3. Culture

- We seek feedback from grantee partners and community members before instituting policy or practice changes.

Yes	Trying, but not there yet	No
.....	.....	.....
TOTAL		.....

### Part 4. Values

- Our organization's work is guided by a clearly articulated set of values
- Our values serve as a touchstone for decision-making, especially during times of uncertainty or change.
- Each of our departments references our organization's values in their work (i.e. learning & evaluation, grants management, finance, legal, etc.
- Our grantee partners' perspectives and contributions are essential to our organization's strategy and goals
- We believe sharing power with grantees and community partners makes us more impactful as funders.
- We see ourselves as accountable to our grantee partners.
- Reflection and learning are key to our and our grantee partners' growth and evolution.

Yes	Trying, but not there yet	No
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
TOTAL		.....

### Reflection Prompts

- 1) Has there been growth or change around these four areas over the last 6-12 months? What factors contributed to that change (or lack thereof)?
- 2) Did the prompts raise any new questions or insights about your organization as a whole?
- 3) Which of the four areas had higher scores? Which had lower scores?
- 4) Was there anything interesting or unexpected about how your scores turned out? Any areas with less consensus? Any contradictions?
- 5) Of the sections that ranked lower, where can you make some realistic changes or adjustments?
- 6) Of the sections that ranked higher, where can you extend the horizon for your practice?
- 7) What is one specific area that your organization can work on over the next 6-12 months? Who needs to be involved in that process?