Rooted Philanthropy Funder Compass: Module 3 - Wheel of Practical Powerful Change

Welcome to Module 3 of the Rooted Philanthropy Funder Compass: Wheel of Practical Powerful Change.

About the module

The purpose of this assessment is to help funders and intermediaries know how they are doing in implementing strategies to change their internal culture, relationships, and practices along the grant cycle for fairer and more trustworthy grantmaking.

There are 15 sections in Module 3, corresponding to 15 leverage points along the funding cycle where funders, intermediaries and communities see potential for practical, powerful change.

Please complete all questions in each of the 15 sections.

Scoring of the questions will allow funders and intermediaries to place themselves along the continuum from starting to growing to sustaining for each of the 15 leverage points along the funding cycle.

About the Funder Compass

The Rooted Philanthropy Funder Compass is an assessment tool designed to help funders and intermediaries situate themselves on their path to change, set their objectives and priorities, and assess their progress.

The Compass has three modules that can be taken separately, in any order or in succession:
Module 1 - Changing Ourselves for funders seeking to change mindsets, policies and processes for deeper transformation beyond the grant cycle
Module 2 - Changing our World for funders seeking to use their collective power, wisdom and assets to advance a flourishing, just and abundant world together
Module 3 - Wheel of Practical Powerful Change for concrete changes funders can make across the grant cycle

The assessment questions for all three modules are drawn from the report, "Rooted Philanthropy: Practical, powerful steps for funders seeking to become Better Ancestors" and from the collaborative process used to develop the framework, tools and resources presented in the report.

Assessment Section 3.1 Relationships between funders and grantees are conscious and trusting

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
1.1	Is your funding strategy transparent to grantees?	Grantees do not have visibility into how we make decisions. Our funding strategy, priorities, eligibility criteria, decision processes, and selection rationale are not transparent to grantees.	We are beginning to share funding priorities, eligibility criteria, and decision timelines with grantees. We explain some decisions, but we are not yet consistent in how transparent we are, and feedback from grantees is not yet built into our process.	Our strategy, criteria, timelines, and selection processes are clear and accessible to grantees. We use grantee feedback systems and mutual accountability structures to improve transparency.	We practice complete transparency and public learning where appropriate; grantees can see, question, and help shape our funding priorities and decisions.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
1.2	Is your communication with grantees direct and aware of power dynamics between you as a funder and grantees?	Our communication is inconsistent. It is more formal than relational. We do not have a power-awareness lens and power imbalances are not acknowledged. Grantees may experience fear, relational tension, or uncertainty about our expectations of them.	We are starting to communicate more directly with grantees and acknowledge power dynamics. We clarify expectations and invite feedback, but grantees may not yet experience communication as consistently safe or reciprocal.	Our communication is direct, timely, and power-aware. It is relational rather than purely formal. Grantees have consistent contact people and can raise concerns.	Power-aware communication is a shared norm with grantees. Grantee feedback shapes our communication and decisions. Trust is reinforced through public evaluations of us as funders, shared governance, or other accountability practices.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
1.3	Are relationship managers available for grantees and consistent?	We have program officers as primary contacts for grantees. Our interactions are mostly transactional or formal. High turnover of contact persons undermines trust and grantees may not know who to contact.	We are beginning to assign consistent contacts and clarify availability. We do have relationship managers in some cases, but this still depends on individual staff and the practice is not yet reliable across our grants.	We have relationship managers available for all grants. They are consistent and go beyond program-officer gatekeeping. They help connect grantees to resources and are an important part of our feedback loops.	Our relationship infrastructure is durable and shared. Grantees have reliable access to people with decision-making power.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
1.4	Do you make listening-focused site visits?	We do not usually make site visits. If we do, they are primarily for evaluation or focused on compliance, and may reinforce power imbalances. We do not center listening, learning, or grantee priorities in our site visits.	We are beginning to design site visits around listening. We ask grantees what would be useful and reduce performative or compliance-heavy elements, but the practice is not yet consistent.	Listening-focused site visits are a regular practice for us. They support multi-directional learning, strengthen relationships, and help us understand grantee context without controlling the agenda.	Listening and learning are embedded across our relationships with grantees. Site visits inform transparent decisions, shared learning, and accountability; grantee expertise influences our strategy, communication, and future grantmaking.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.2 Funding priorities are collaboratively decided and reassessed

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
2.1	Do you have community advisory boards who co-develop funding priorities and share decision-making?	We set our own funding priorities. We do not have community advisory boards. If we do, they are symbolic. We consult them after priorities have already been decided.	We are beginning to invite community input into our funding priorities through advisory groups or listening sessions, but their decision-making power and follow-through are still limited or inconsistent.	Community advisory boards regularly shape our funding priorities and help us reassess them. Members have clear roles, accessible information, and meaningful influence in decisions.	Community advisory boards co-develop funding priorities with us and share decision-making power. Their guidance is built into our strategy, grant design, reassessment, and accountability structures.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
2.2	Is your strategic planning equity-focused?	Our strategic planning is driven only by us. Our process does not center community priorities, disparity data, or the experiences of communities most affected by inequities.	We are beginning to use an equity lens in planning and to ask who benefits, who might not, and what unintended consequences could result.	Our strategic planning is routinely equity-focused, and is informed by communities, data, stories, and an explicit analysis of disparities and root causes.	We have equity-focused strategic planning that is co-developed with communities and continuously refined. It balances immediate needs with longer-term systems change.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
2.3	Do you use data to identify gaps?	The information we use to identify gaps is incomplete or based on assumptions. We rarely use disparity data, story, and community knowledge.	We are beginning to review data and community feedback to understand gaps, but the process is uneven and not yet tied to how we make funding decisions.	Our identification of gaps is data-driven and includes both quantitative data and community stories as rigorous strategy-driving information.	Together with communities, we make sense of data, lived experience, and story to identify gaps, set funding priorities, and reassess our strategy over time.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
2.4	Do you value lived experience?	We do not consider lived experience in setting our funding priorities. Professional credentials, our own assumptions or other funders carry more weight than community perspectives.	We are starting to invite communities with lived experience into planning conversations, but participation is still limited or not connected to decisions. Community participation is unpaid.	We value lived experience as essential knowledge. Community members influence our priorities, our interpretation of data, and our reassessment of strategy.	We center lived experience as expertise. Community wisdom-holders are partners, strategists, and sense-makers with shared power in priority-setting.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
2.5	Do you regularly reassess your funding priorities?	Our funding priorities are fixed for long periods, and we do not routinely reassessed them with communities or grantees as conditions change.	We are beginning to revisit priorities periodically and invite feedback, but reassessment is informal or not consistently acted upon.	We regularly reassess funding priorities with grantees and communities through feedback loops, learning conversations, and review of emerging issues.	Reassessment is a shared, ongoing practice for us. Our funding priorities evolve with community realities, data, learning, and long-term systems-change goals.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.3 Grants are co-designed and integrate multiple perspectives

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
3.1	Is your grant design participatory, and does it improve alignment between you and grantees?	Our grants are primarily designed by us as the funder. We either do not invite community participation, or this is minimal or too late to improve alignment.	We are beginning to invite grantees and community partners into grant design, but participation is inconsistent and power imbalances remain.	Our grant design is participatory and improves alignment between our goals and grantee/community realities. Their input shapes the scope, process, and expectations of our grants.	Our grant design is co-owned with grantees and communities. We have shared language, shared decisions, and structures that make alignment durable over time.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.2	Are your grant priorities co-developed to support better long-term impact?	We develop grant priorities internally. We expect grantees to conform their activities to our strategic choices.	We are starting to discuss priorities with grantees before launch, but co-development with grantees does not yet consistently shape our long-term strategy or impact.	We co-develop grant priorities with grantees and community partners. This supports stronger fit, shared goals, and better long-term impact.	Co-developed priorities guide our full grant life cycle and we revisit these as relationships and community needs evolve.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.3	Do multiple perspectives inform your grant design?	Our grant design is shaped by internal decision-makers. This is usually a narrow group. Multiple perspectives, including community and cross-sector perspectives, are missing from our grant design.	We are beginning to bring additional perspectives into design conversations, but representation and decision-making power are uneven.	Our grant design is informed by multiple perspectives. This can be through community-led workshops, cross-sector teams, and grantee-led feedback loops.	We embed diverse perspectives throughout design, implementation, learning, and replication of grant models. These perspectives hold equal power.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.4	Do community listening sessions inform your grant design?	We do not use community listening sessions, or we use them mainly to validate decisions we have already made.	We are beginning to hold community listening sessions, but they don't necessarily influence our grant design, timelines, requirements, or funding priorities.	Community listening sessions inform our grant design and help us understand what a win-win looks like for everyone.	Listening is systematic and ongoing for us. Community insights directly shape design, decision-making, learning, and adaptation across our grant cycle.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.5	Do you compensate communities for their input?	We expect communities to provide input without compensation, regardless of whether they are community members or small or low-resourced organizations.	We are beginning to compensate some forms of input, but our practices are inconsistent or we do not budget for them from the outset.	We compensate community input as part of our design, review, and learning activities. Participation costs and accessibility needs are planned for and resourced.	Compensating community expertise is standard practice for us. This reflects our respect for lived experience and commitment to supporting equitable participation in shared decision-making.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.6	Do you have community advisory boards to help you be more accountable?	We do not have community advisory boards or they have unclear roles. They do not meaningfully hold us accountable for our design choices or outcomes.	We are beginning to use advisory structures for accountability, but their influence over our design and institutional practice is limited.	Community advisory boards help us be more accountable by reviewing our priorities, grant design, and whether our processes reflect community realities.	Community advisory boards have shared power in shaping our strategy, design, implementation, and learning. They help transform our institutional accountability.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
3.7	Is decision-making shared with communities?	Our decision-making remains internal. We have closed networks of influence. Grantees and communities have limited visibility into our networks and processes.	We are piloting shared decision-making in some grants, but final control and risk decisions largely remain with us.	We share decision-making with communities through inclusive review and community-led design. We have transparent roles for ourselves, grantees, and community partners.	We have embedded shared decision-making as a norm. Communities act together with us to co-design, invest in, and learn from change efforts.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.3 Grants are co-designed and integrate multiple perspectives (continued)

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
3.8	Do your relationships with grantees and communities evolve over the long term?	Our relationships with grantees and communities are short-term or transactional and usually end when a grant cycle or application process ends.	We are beginning to invest in longer-term relationships with grantees and communities, but our engagement is still tied mostly to active grants or immediate decisions.	Our relationships with grantees and communities evolve over the long term through ongoing learning, feedback, and shared problem-solving beyond individual transactions.	We have long-term relationships with grantees and communities that outlast grants and become infrastructure for mutual trust, strategy, adaptation, and collective impact.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.4 Eligibility criteria is flexible, facilitating applicant alignment

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
4.1	Have you eliminated 501(c)(3) requirements for grant applicants?	Eligibility depends on fixed 501(c)(3) requirements that may exclude many grassroots groups, fiscally sponsored groups, and community-led initiatives.	We are exploring alternatives such as fiscal sponsorship or intermediaries, but 501(c)(3) status is still the default requirement.	We have flexible 501(c)(3) requirements or we waive them where legally possible. This creates pathways for community-led and low-resourced organizations to apply.	Our eligibility requirements are centered on impact and community connection rather than legal form. We use values-aligned intermediaries or other structures to reduce exclusion.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
4.2	Do you prioritize values alignment over program fit?	For applicants to be eligible, their program must fit with our priorities even when they are closely aligned with community needs and values.	We are beginning to distinguish values alignment from narrow program fit, but eligibility criteria may still pressure applicants to conform to our framing.	We prioritize values alignment over program fit. Applicants can explain how their work advances shared goals in their own context and language.	Our eligibility criteria are co-informed by communities and allow applicants to align from their strengths, strategies, and lived realities rather than our frame.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
4.3	Do you recognize and value cultural competence?	Our eligibility criteria or review processes favor well-resourced organizations. We don't take into account cultural competence, language, or community context.	We are beginning to acknowledge cultural competence in eligibility criteria, but it is not yet consistently defined, valued, or weighted.	We recognize and value cultural competence as part of applicants' strength, strategy, trust, and ability to work with communities.	We treat cultural competence and community-rooted practice as essential expertise, and our review tools counter bias and honor multiple ways of knowing.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
4.4	Do you value community connections?	Our eligibility criteria favor formal credentials, scale, or existing funder relationships. We do not explicitly value community connections.	We are starting to ask about community relationships, but our criteria and documentation requirements do not yet fully recognize trust and connection.	Community connections are valued in our eligibility and review criteria as evidence of relevance, trust, and ability to meet community priorities.	Community connection is central to eligibility for us; we actively seek and support trusted organizations beyond existing networks.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
4.5	Do you explicitly value lived experience as expertise?	We do not treat lived experience as expertise. Applicants are assessed primarily on formal qualifications or organizational capacity.	We are beginning to name lived experience as valuable, but our review tools and eligibility criteria do not consistently weight it.	We explicitly value lived experience as expertise in our eligibility criteria, review rubrics, and applicant alignment feedback.	Lived experience is a core form of knowledge and leadership for us. It shapes eligibility criteria, decision-making, strategy, and assessment of our own readiness .		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
4.6	Is it possible for applicants, particularly low-resourced organizations, to partner with intermediaries?	We do not offer the possibility for applicants to partner with intermediaries. Even if they are low-resourced, organizations must navigate eligibility and compliance requirements on their own.	We are exploring intermediary partnerships, but pathways are unclear or limited to certain grants.	We are open to applicants partnering with intermediaries. Values-aligned intermediaries can support low-resourced organizations with eligibility, fiscal sponsorship, capacity, and reduce administrative burden.	We resource intermediary partnerships as equity infrastructure. They help organize strategy, reduce burden, and reinforce partnership between us and communities.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.5 Communication is co-determined and co-developed by funders and grantees

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
5.1	Do grantees co-determine the level and type of grant acknowledgment you expect in their communication?	We set acknowledgment requirements ourselves. We do not look at whether our visibility or approval expectations are restrictive or if they fit grantee context.	We are beginning to discuss acknowledgment preferences with grantees, but requirements are still mostly defined by us.	Grantees co-determine with us the level and type of grant acknowledgment. We have flexible guidelines that respect safety, visibility, and community context.	Our acknowledgment practices are grantee-led and power-aware. They balance transparency, safety, narrative ownership, and shared communication goals.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
5.2	Do you develop messages jointly with grantees?	Messages are developed by us. We do not consider whether they may be disconnected from or misaligned with community realities and grantee expertise.	We are beginning to invite grantee input on messaging, but collaboration happens inconsistently or late in the process.	We develop messages jointly with grantees, using language that respects community context and strengthens alignment.	Joint messaging is a shared practice for us, with grantees shaping narrative, language, timing, and audience to support community-centered communication.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
5.3	Do you and grantees share communication platforms for visibility?	Our platforms are used mainly for our own visibility. Grantee visibility and narrative ownership are limited.	We are beginning to share platforms with grantees, but opportunities are ad hoc and may still prioritize our brand.	We share communication platforms with grantees for visibility, and grantee expertise and voice are centered in our public messaging.	We leverage communication platforms as shared assets that amplify grantee leadership, community stories, and collective learning.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
5.4	Do you support grantees to build their communications capacity?	We offer little to no communications support to grantees, even when our expectations may increase communication burden for grantees.	We are beginning to offer communications advice or templates, but support is not yet resourced or tailored to grantee needs.	We support grantees to build communications capacity through funding, coaching, storytelling support, and practical tools.	Communications capacity-building is part of our beyond-the-grant support and helps grantees own narratives, build visibility, and sustain impact.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
5.5	Do your communications respect grantee expertise?	Our communication does not take into account grantee expertise, and we do not consider whether the language we use is heavy, oppressive, jargon-filled, or disconnected from community meaning.	We are beginning to review our language and ask grantees for feedback, but habitual practices and approval processes still shape communication.	Our communication respects grantee expertise and uses clear, aligned, community-centered language.	Grantee expertise shapes our communication norms, approvals, narratives, and learning; we treat language as a tool for equity and relationship.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.6 Grant opportunities are widely publicized and free to access

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing: “We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
6.1	Is the language in your grant announcements accessible?	Our grant announcements use jargon-heavy or complex language that may be disconnected from the realities of the people the grants are intended to serve.	We are beginning to simplify announcements and reduce jargon, but accessibility varies across grant opportunities.	Our grant announcements use accessible language and clearly explain purpose, eligibility, timelines, criteria, and how to apply.	Accessible, context-aligned language is standard for us. We test our language with communities to make sure our announcements are understandable, inviting, and useful.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.2	Do you publicize grants through multiple channels, including social and community networks?	We publicize grant opportunities through selected channels or existing funder networks. This can be an advantage for organizations already connected to us.	We are beginning to use additional channels, including social media or partner newsletters, but reach remains uneven.	We publicize grants through multiple channels, including social and community networks that reach underrepresented applicants.	Our outreach is proactive, diversified, and community-informed. We use multiple trusted channels to reduce access gaps for grassroots organizations.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.3	Are the media channels you use varied, and do they include cultural and language-specific channels?	We use a narrow set of media channels that may not reflect the languages, cultures, or access realities of intended communities.	We are beginning to translate or adapt outreach for some communities, but culturally specific channels are not used consistently.	Our media channels are varied and include cultural, language-specific, and community-based outlets.	We build cultural and language-specific outreach into every opportunity, with communities helping identify trusted messengers and channels.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.4	Do you partner with community organizations to share opportunities?	We do not engage community organizations as outreach partners, and our opportunities may not reach grassroots or low-resourced groups.	We are beginning to ask some partners to circulate opportunities, but partnerships are informal and not resourced.	We share opportunities through partnerships with community organizations that understand local trust, access, and context.	Our community outreach partnerships are resourced, reciprocal, and part of a broader strategy to expand access and accountability.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.5	Do you use community-based information sessions as announcement channels?	We do not generally offer information sessions. If we use them, this is only after applicants have already found the opportunity through other channels.	We are beginning to hold information sessions, but they may be online-only, hard to access, or not designed to function as outreach channels.	Our community-based information sessions function as announcement channels and help potential applicants understand fit, process, and expectations.	Our information sessions are community-hosted, accessible, multilingual where needed, and used to build trust, answer questions, and invite participation.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.6	Do you use community-based outreach to identify potential grantees?	We identify potential grantees mostly through internal lists, known networks, or prior applicants. Access is limited for new or grassroots groups.	We are beginning to ask partners and staff to identify potential applicants, but outreach remains uneven.	We identify potential grantees through community-based outreach, ambassador strategies, and trusted local networks.	Our community-based outreach is systematic and ongoing. This helps us discover organizations with trust, proximity, and alignment beyond our existing networks.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
6.7	Are your grant opportunities publicized in centralized grant directories and on portals available at no cost to applicants?	Our grant opportunities are listed in selected directories or on paid platforms. They can be hard to find or create barriers for organizations with limited resources.	We are beginning to post opportunities in more places, but no-cost centralized access is inconsistent.	Our announcements are published in centralized grant directories and portals that are free for applicants to access.	Free, centralized access is standard for us. We collaborate with sector partners to keep directories current, accessible, and widely known.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.7 Applicants are supported in preparing proposals

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

Question #	Question	Not yet started	Starting: “We're early and still figuring things out.”	Growing:“We're getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable (NA) or I don't know (IDK)	Score
7.1	Do you offer pre-application “office hours” and webinars during grant cycles?	We do not offer pre-application support. Applicants interpret requirements on their own.	We offer occasional office hours or webinars, but access and usefulness vary.	We routinely offer pre-application office hours and webinars in accessible formats and help applicants understand fit and process.	Our pre-application support is embedded, multilingual where needed, and shaped by applicant questions and feedback.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.2	Do you propose capacity building and support for preparing proposals?	Applicants receive little capacity building or support from us to prepare proposals.	We are beginning to offer guidance or referrals, but support is ad hoc.	We offer capacity building and proposal preparation support. This helps reduce disparities in grant writing skills.	We resource proposal support as part of fair access. This includes coaching, peer learning, and practical tools for low-resourced applicants.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.3	Do you have funding available for applicants to engage grant writers?	Applicants bear grant-writing costs on their own. This is a disadvantage for organizations with limited staff capacity.	We are exploring stipends or technical assistance, but funding for grant writers is limited.	We have funding available for applicants to engage grant writers or other proposal support when needed.	We have normalized proposal preparation funding. This is targeted to reduce inequities in application capacity.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.4	Do you accept applicants' existing materials in applications?	We require applicants to create new materials for each application, even when existing materials would provide the same information.	We accept some existing materials, but requirements are inconsistent or unclear.	We accept existing materials in applications wherever possible, reducing burden and duplication.	Our application design begins with existing grantee materials and only asks for information necessary for decision-making and learning.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.5	Are application templates multi-language?	Our application templates are only available in one language or use inaccessible language.	We are beginning to translate or simplify some templates.	Our application templates are multi-language and use simple, accessible language.	Our templates are multilingual, culturally responsive, and tested with applicants for clarity and usability.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.6	Do you accept video and audio applications?	We limit applications to written formats. This may be an advantage for applicants with stronger formal writing capacity.	We are beginning to consider video or audio submissions in some cases.	We accept video and audio applications as valid submission formats.	We have normalized multiple formats and applicants can choose the format that best reflects their work, capacity, and context.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	
7.7	Are your application windows 6–8 weeks or more?	Our application windows are short and do not take into consideration grantee capacity or community realities.	We are beginning to extend some deadlines, but timelines still vary and may be rushed.	We have extended application windows to 6–8 weeks or more, allowing time for preparation, collaboration, and questions.	Our application timelines are co-informed by applicants and designed to reduce burden, support access, and protect grantee wellbeing.		
		1	2 3 4	5 6 7	8 9 10	NA or IDK	

Assessment Section 3.8 Application submission platforms are simple and intuitive

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing:“We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
8.1	Are your application platforms user-tested?	Our platforms are selected or designed without user testing by applicants. They do not make specific provision for applicants with limited technology access or capacity.	We are beginning to gather user feedback, but testing is not yet routine.	We test application platforms with diverse applicants before launch.	User testing and continuous improvement are built into our platform selection, design, and renewal.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.2	Are your application system interfaces intuitive to minimize error?	The interfaces we use can be confusing, error-prone, or require unnecessary steps and documentation.	We are beginning to simplify interfaces and instructions, but applicants still experience avoidable errors.	Our application system interfaces are intuitive and designed to minimize error.	Our interfaces are simple, accessible, and continuously improved based on applicant experience and technical support data.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.3	Do your application platforms have multi-language interfaces?	Our platforms are not multilingual. Access for applicants and communities that use other languages is limited.	We are piloting translation or multilingual guidance, but the interface remains limited.	Our application platforms have multi-language interfaces or equivalent multilingual submission support.	Multilingual access is standard for us and includes translated instructions, support, confirmations, and key communications.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.4	Are your application platforms mobile-friendly?	Our platforms are not adapted for mobile devices.	We are beginning to assess mobile usability, but not all application steps work well on phones.	Our application platforms are mobile-friendly and usable across common devices and operating systems.	Mobile accessibility is a core requirement for our application platforms. We recognize that applicants have varied technology access and bandwidth.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.5	Do your application platforms have auto-save features?	Our platforms do not reliably save work. There is risk of lost applications and additional burden for applicants.	We are beginning to use autosave or draft features, but they are inconsistent or poorly communicated.	Our application platforms have auto-save features that are clear, reliable, and easy for applicants to use.	Our platforms have autosave, incremental submission, and draft review features as standard to reduce stress, error, and rework.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.6	Are submission confirmations clear and easy to save?	Our platforms do not always issue submission confirmations. Confirmations can be unclear or hard to save for applicant records.	We are beginning to send confirmations, but applicants may not receive enough detail.	Our submission confirmations are clear, timely, and easy to save.	Our confirmations include next steps, timelines, contacts, and records of submitted materials in accessible formats.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
8.7	Do you have technical assistance hotlines available?	We have little or no technical assistance for applicants when platform problems arise.	We are beginning to provide a help contact, but response times or channels are limited.	We ensure technical assistance hotlines or equivalent support channels are available during application windows.	Our technical support is proactive, multilingual where needed, and offered through multiple channels to reduce digital divide barriers.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.9 Grantee selection processes are transparent and inclusive

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing:“We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
9.1	Are your selection processes two-phase and interactive, and do they go beyond application forms?	Our selection relies on structured applications only. There is little interaction or opportunity to clarify fit.	We are piloting interviews or staged processes, but practices are inconsistent.	Our selection processes are two-phase, interactive, and go beyond application forms.	Interactive selection is standard for us and designed to reduce bias, clarify alignment, and support applicant learning.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
9.2	Is your scoring criteria transparent?	We do not share scoring criteria with applicants, or they are not clear.	We are beginning to share criteria, but scoring and weighting may remain unclear.	We make sure scoring criteria are transparent and publicized before or during the application process.	Our scoring criteria are transparent, co-informed by communities and include values such as lived experience, trust, and community connection.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
9.3	Is your communication clear regarding the selection process?	We have limited communication about selection. Our selection process may be unclear or change without explanation.	We are beginning to clarify selection steps and timelines, but updates are inconsistent.	Our communication is clear regarding the selection process, timeline, decision points, and applicant expectations.	Our selection communication is proactive, accessible, and power-aware. We want to reduce uncertainty and protect applicant wellbeing.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
9.4	Do your reviewers have diverse perspectives?	We do not have diversity among our reviewers. Reviewers may be from closed networks of influence or overly rely on credentials.	We are beginning to diversify reviewers, but representation and training are uneven.	We have reviewers have diverse perspectives, including lived experience and community knowledge relevant to the opportunity.	We have embedded reviewer diversity, bias mitigation, and community expertise as selection requirements.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
9.5	Do your review committees include community members with equal power?	Community members are absent from our review committees or do not have meaningful power.	We are beginning to include community members, but roles, compensation, or authority may be limited.	Our review committees include community members with equal power and clear decision-making roles.	Community participation in review is resourced, respected, and part of shared governance for our funding decisions.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
9.6	Do you provide ongoing and continuous feedback to applicants?	Our feedback to applicants is limited to final decisions only. Feedback can be delayed or not provided at all.	We are beginning to provide feedback at some points, but it is not yet continuous or actionable.	Our feedback to applicants is ongoing and continuous. This helps applicants understand fit and improve proposals.	We have feedback loops embedded before, during, and after selection. This supports mutual learning and fairer decisions.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.10 Applicants receive timely notification and honest feedback.

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
10.1	Do you notify all applicants of the outcome of their application ?	Our notifications may be delayed or inconsistent. Applicants may not receive clear notification of the outcomes of their application.	We are beginning to ensure all applicants are notified, but timing or clarity varies.	We notify all applicants of the application outcome in a timely, respectful way.	We treat notification as part of applicant wellbeing. We have consistent, power-aware processes for every applicant.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
10.2	Do you specify notification timelines in advance?	We do not specify notification timelines in advance. This can create uncertainty for applicants.	We are beginning to share estimated timelines, but updates are inconsistent when timelines change.	We specify notification timelines in advance and promptly inform applicants of changes.	Our timelines are transparent, reliable, and designed with applicant planning needs in mind.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
10.3	Do you communicate rejections through phone calls rather than forms or email templates?	We inform applicants of rejections through form letters or email templates. These may be impersonal with little consideration for power dynamics or applicant effort.	We are beginning to personalize some rejection communication, but phone calls or conversations are limited.	We communicate rejections through phone calls or other personal approaches where appropriate, instead of only letters or email templates.	We make sure communication about rejection is sensitive, relational, and paired with constructive feedback and next-step options.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
10.4	Do you communicate decision rationales clearly?	We do not communicate decision rationales. It can be unclear to applicants why they were or were not selected.	We are beginning to explain some decisions, but rationales are uneven or too general.	We communicate decision rationales clearly and respectfully.	We embed clear rationales in our feedback processes, which helps applicants understand alignment, criteria, and possible future pathways.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
10.5	Do you provide direct and honest feedback on applications?	We do not generally provide feedback, or it is vague or indirect. Our feedback is not intended to help applicants learn from the process.	We are beginning to share feedback, but it may be inconsistent or overly cautious.	Our feedback on applications is direct, honest, sensitive, and constructive.	We have normalized direct and honest feedback as mutual learning. Feedback is delivered with care, context, and practical next steps.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
10.6	Do you share feedback through one-on-one conversations?	We do not offer feedback through conversation. There is little opportunity for applicants to ask questions or understand decisions.	We are beginning to offer conversations to some applicants, but access is limited.	We share feedback through one-on-one conversations where applicants can ask questions and receive support.	We offer one-on-one feedback conversations as standard. These are resourced and connected to capacity-building or learning pathways.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.11 Unsuccessful applicants have options for connection and learning

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
11.1	Do you offer connections to capacity building and learning communities to unsuccessful applicants?	We do not offer connections to capacity building or learning communities to unsuccessful applicants.	We are beginning to share resources or referrals, but connections are ad hoc.	We offer connections to capacity building and learning communities to unsuccessful applicants.	We have built connection and learning pathways into the process so application effort can still create value and relationships.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
11.2	Do you offer capacity grants for promising organizations who were not selected?	We do not provide support to strengthen capacity or opportunities to stay engaged for organizations that are not selected.	We are beginning to consider small grants or referrals for promising applicants, but no consistent pathway exists.	We offer capacity grants for promising organizations that were not selected.	We offer capacity grants and support pathways as ways of reducing loss, supporting wellbeing, and strengthening the ecosystem.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
11.3	Do you offer connections to other funders?	We do not connect unsuccessful applicants to other funders or opportunities.	We are beginning to make occasional introductions, but this depends on individual staff relationships.	We respectfully offer connections to other funders where there is alignment.	We use our funder networks as shared assets to help unsuccessful applicants find aligned opportunities and continue their work.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.12 Grant agreements are simple, clear, and accessible

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
12.1	Have you simplified contracting for grantees?	Our contracting process is complex and lengthy. This may be taxing for grantees, especially smaller or less-resourced organizations.	We are beginning to streamline some contracting steps, but the process remains burdensome or inconsistent.	We have simplified contracting and designed our process to reduce administrative burden for grantees.	Our contracting is grantee-informed, proportionate to risk, and aligned with trust, flexibility, and mutual accountability.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
12.2	Do you use plain agreement language without legal jargon?	Our agreement language is legalistic. It can be jargon-heavy or difficult for grantees to understand.	We are beginning to revise agreement language, but legal jargon and unclear terms remain.	We use agreement language that is plain, accessible, and without unnecessary legal jargon.	We have plain-language agreements that are co-reviewed with grantees to ensure clarity, accessibility, and shared understanding.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
12.3	Are your processes to amend agreements explicit and streamlined?	We do not have processes to amend agreements when circumstance change, or our processes are restrictive and can be unclear.	We are beginning to allow amendments, but the process may be slow, unclear, or staff-dependent.	We have processes to amend agreements that are explicit, streamlined, and accessible to grantees.	We have built flexible amendment processes into our agreements. These allow scope, budget, and timeline adaptation as community realities change.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.13 Grant terms are supportive and manageable for grantees

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
13.1	Are your grant terms aligned with grantee capacity and context?	We do not take into account grantee capacity, context, or changing community conditions when we set grant terms.	We are beginning to adjust terms for some grantees, but requirements are not consistently aligned with capacity.	Our grant terms are aligned with grantee capacity and context.	We co-develop grant terms are with grantees and design them around project needs, wellbeing, flexibility, and community realities.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
13.2	Is your funding multi-year and unrestricted?	Our funding is short-term, restricted, or expense-reimbursable. This may limit grantee flexibility and stability.	We are beginning to offer some flexible or longer-term support, but one-year restricted grants remain common.	Our funding is multi-year and unrestricted where possible.	Multi-year, flexible support is the norm for us. We with long-term commitments visible and tangible.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
13.3	Are your overhead and indirect rates realistic?	Our overhead and indirect rates are low or not aligned to granteee realities. Grantees must absorb true costs.	We are beginning to review indirect cost policies, but rates may still be too low or inconsistently applied.	Our overhead and indirect rates are realistic and help cover the full cost of the work.	We have embedded full-cost funding, which includes realistic indirect rates, staff wellbeing, infrastructure, and adaptation needs.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
13.4	Are your budget revision processes flexible?	We do not have flexible budget revision processes. This makes it hard for grantees to pivot when circumstances change.	We are beginning to allow revisions, but approvals may be slow or unclear.	Our budget revision processes are flexible and responsive to emerging issues.	Budget flexibility is standard for us and grounded in trust, allowing grantees to explore, pivot, and respond to what the situation requires.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
13.5	Are your reporting requirements and frequency flexible?	Our reporting requirements and frequency are not aligned with grant size or grantee capacity. They can be burdensome and are not designed for us to learn from them.	We are beginning to reduce reporting burden, but requirements remain inconsistent across grants.	Our reporting requirements and frequency are flexible and aligned with grantee capacity and project needs.	Our reporting is right-sized, learning-focused, and co-designed with grantees to support reflection rather than compliance.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.14 Funds are disbursed upfront, and compliance is facilitated

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
14.1	Do you disburse grants in full and up front?	Our grants are reimbursed after expenses. Disbursement can be delayed, causing cashflow problems for organizations.	We are beginning to provide some upfront payments, but disbursement varies by grant or risk assessment.	Our grants are disbursed in full up front where possible to support cash flow.	Upfront disbursement is standard for us. This is based on trust and an understanding of grantee operating realities.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
14.2	Have you reduced the number of payment tranches?	Our payments are divided into several tranches. This can create administrative burden and cashflow uncertainty.	We are beginning to reduce payment tranches, but payment schedules may still be complex.	Our payment tranches are fewer and aligned with grantee needs.	Our payment schedules are simple, predictable, and co-designed to reduce burden and support timely implementation.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
14.3	Do you have appropriate indirect cost rates, at 25% or more?	Our indirect cost rates are low or restrictive, and several true costs are not reimbursed.	We are reviewing indirect cost policies, but rates may still fall below what grantees need.	Our indirect cost rates are appropriate, at 25% or more where feasible, and help cover real costs.	Our indirect cost policies support full-cost funding and are applied equitably, transparently, and flexibly across grants.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
14.4	Have you simplified your financial templates ?	Our financial templates are complicated, duplicative, or require considerable documentation.	We are beginning to simplify templates, but documentation remains burdensome.	Our financial templates are simplified and focused on information needed for stewardship and learning.	Our financial processes are streamlined, accessible, and proportionate, reducing administrative burden for grantees.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
14.5	Are your compliance terms and documentation manageable for grantees?	Our compliance terms and documentation are burdensome and not always manageable for grantees.	We are beginning to right-size compliance requirements, but expectations vary or remain unclear.	Our compliance terms and documentation are manageable for grantees.	We have facilitated compliance through trust-based, proportionate requirements and clear support rather than excessive monitoring.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
14.6	Do you have assistance available to grantees for financial compliance?	We do not have assistance available for financial compliance. Grantees navigate complex requirements alone.	We are beginning to offer limited guidance, but support is reactive or staff-dependent.	We have assistance available to grantees for financial compliance.	Our financial compliance support is proactive capacity-building, helping grantees meet requirements without diverting from mission work.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	

Assessment Section 3.15 Grant reporting is learning-focused and available in multiple formats

Instructions:
* Read each question and the range of responses available.
* There are four response options available for each question, moving from left to right, corresponding to four stages from 'Not yet started' to 'Sustaining'.
* Select a score that you think best describes your philanthropic practice.
* There is only one possible score for 'Not yet started'.
* There are three possible scores for each of the other stages. For example, within 'Starting', the possible scores are 2, 3, or 4, corresponding to whether you are beginning to work on that stage (2), clearly working in that stage (3), or starting to move into the next stage but are not quite there yet (4).
* If you don't know an answer or feel a question is not relevant, select IDK for 'I don't know' or NA for 'Not applicable.

New Question #	Question	Not yet started	Starting: “We’re early and still figuring things out.”	Growing: “We’re getting the hang of this!”	Sustaining: “This is who we are and how we do our work.”	Not applicable or I don't know	Score
15.1	Are your reporting requirements simplified and standardized across other funders?	Reporting requirements are complex, frequent, and different from other funders, draining grantee capacity.	We are beginning to simplify reporting, but requirements are not yet standardized or coordinated.	We have simplified our reporting requirements and standardized them with other funders' requirements where possible.	Our reporting is coordinated, right-sized, and designed to reduce burden while supporting shared learning.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
15.2	Are your metrics co-defined with grantees?	We define metrics ourselves. These may not match the grant context or what communities value.	We are beginning to ask grantees about meaningful metrics, but measures defined by us still dominate.	Our metrics are co-defined with grantees and reflect context, culture, and community priorities.	Our metrics, stories, and learning questions are co-owned with grantees and communities as part of participatory evaluation.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
15.3	Does your reporting place meaningful reflection over compliance?	Our reporting focuses on compliance rather than meaningful reflection or improvement. It may function as judgment.	We are beginning to include reflection questions, but compliance still drives reporting.	Our reporting places meaningful reflection over compliance and supports learning conversations.	Our reporting is a mutual learning process for reflection, adaptation, and improvement throughout the grant relationship.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
15.4	Are your reports brief, learning-focused narratives?	Our reports are long, repetitive, or highly focused on quantitative measurements.	We are beginning to shorten reports or invite narrative, but requirements remain inconsistent.	Our reports are brief, learning-focused narratives that help tell the story of the work and what is being learned.	We value narrative reporting as rigorous learning and use it to inform strategy, relationships, and systems change.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
15.5	Do you accept existing materials for reporting?	We do not accept existing materials such as annual reports or presentations. This may create duplication of effort for grantees.	We are beginning to accept some existing materials, but only in limited cases.	We accept existing materials for reporting when they provide the needed learning information.	Our reporting starts from materials grantees already create and asks only for what is necessary for shared learning and accountability.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	
15.6	Do you have verbal or video reporting options?	Our reporting is limited to written forms, even when other formats would better capture learning or reduce burden.	We are beginning to pilot verbal or video reporting, but written reports remain the default.	We offer verbal or video reporting options.	Multiple reporting formats are standard for us and grantees choose the format that best supports reflection, accessibility, and learning.		
		1	2 3 4	5 6 7	8 9 10	N/A or IDK	