



The Equity Learning Lab

Building the Capacity of
Health Organizations to
Embed Equity in their Work

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About Learning for Action (LFA)

LFA's mission is to partner with social sector organizations to strengthen their learning culture and practice, in service of equity and justice. We do this through **strategic reflection and learning/evaluation, organizational development, and capacity building**.

We support our clients to tackle complex problems, push for structural and systemic change, and address the root causes of inequities. We hold diverse content area expertise, including **healthcare, education, economic mobility, immigration, advocacy, leadership development, arts/cultural programs, and building the capacities and power of communities**.

Our work is **person-centered, grounded in equity, and data driven**. We engage deeply with our clients, collaborating on and facilitating processes that draw on all partners' strengths, while also providing guidance and recommendations based on our extensive experience. We use inclusive and participatory processes that amplify and center the voices, perspectives, and stories of those closest to the work

Over the course of our 24-year tenure, we have conducted more than **900 evaluation, capacity building, and consulting projects for organizations, foundations, and government and county agencies** across the social sector. We have staff in all regions of the United States and experience with organizations doing work everywhere from their own neighborhoods to internationally.

About Public Equity Group (PEG)

Public Equity Group (PEG) is a diverse practice of strategy and management consultants mobilized to help visionary leaders and organizations achieve impact. PEG works with partners poised to make a demonstrable difference on the "big issues of the day" — in service of equity. In particular, we look for clients with the following qualities:

- Deep equity/justice commitment and compatible organization values
- High potential for national or global impact, scale, and/or replication
- Strong leadership (strategic thinking, management, implementation)
- High organization capacity to implement (staff and board quality; planning, monitoring, operations, and systems quality)

About Robert Wood Johnson Foundation (RWJF)

Robert Wood Johnson Foundation (RWJF) is a leading national philanthropy dedicated to taking bold leaps to transform health in our lifetime. To get there, we must work to dismantle structural racism and other barriers to health. Through funding, convening, advocacy, and evidence-building, we work side-by-side with communities, practitioners, and institutions to achieve health equity faster and pave the way, together, to a future where health is no longer a privilege, but a right.



Introduction

In early 2021, organizations receiving funding¹ from the Robert Wood Johnson Foundation (RWJF) embarked on a collective endeavor to build their individual organizational capacities around advancing equity, particularly racial equity. These organizations, which are part of RWJF's Transforming Health and Health Care Systems portfolio strategy to improve health and health care systems, requested a *different* level of support and partnership from the foundation. While most of them were already explicitly working on health equity, they were now asking for support to center racial+ equity² in their work, both inside and outside their organizations. Launched in the midst of a global pandemic and a national reckoning on racial injustice (and a subsequent backlash), this project eventually became known as the Equity Learning Lab (ELL).³

In the philanthropic sector and in the health and health care fields, RWJF is highly influential, consistently ranked as one of the largest private philanthropic organizations in the United States and as the largest foundation solely devoted to health. While the ELL was not RWJF's only effort focused on building equity-related organizational capacity, it was notable for its size and scope of support provided to the organizations. Nearly 40 organizations, ranging from large hospital associations to health advocacy groups to public health accreditation boards, engaged in a significant, supported effort to center racial equity in their work. Funded partners were given a variety of resources to help them with this endeavor: a reflection and assessment tool, developed especially for this project, to understand progress already made in advancing equity across several organizational dimensions and then to set goals; customized coaching for each organization; an extensive curriculum of curated equity-related resources and tools; and opportunities to come together in small or large groups with other organizations in the cohort to share insights.

¹ Organizations receiving funding from philanthropic organizations are commonly referred to as “grantees,” but this project intentionally designated organizations funded by the Robert Wood Johnson Foundation as “funded partners” as a way to recognize the agency of the organizations in choosing to do this work and to acknowledge that their identities are not solely defined by receiving a grant from a foundation.

² The term “racial+ equity” refers to the fact that while racial equity was the primary focus of this project, organizations also had latitude to address other dimensions of equity.

³ As is common practice at RWJF, the foundation engaged intermediaries to design and implement an initiative. They selected Learning for Action and Public Equity Group to co-design and implement the ELL.

As expected, and by design, the experiences of the participating organizations varied widely. While organizations connected by a grantmaking strategy may share common topics of interest and high-level goals—like transforming health and health care systems—in reality, organizations are highly diverse and exhibit different stages of learning in their life cycles and evolution. This piece serves as the primer to a content series about the ELL, which captures some of these organizations’ experiences. This primer provides an overview of the ELL; subsequent pieces will focus on different themes that emerged as particularly salient over the course of the ELL, highlighting stories from the project leads and participants.⁴

The broad span of organizations involved in this project, and the customizable nature of the support and assistance provided, have generated an equally broad span of stories and experiences to share. Stories can help make this work relatable, human-centered, and less abstract, which we believe is a necessary aspect of doing racial+ equity work, especially during these times when the public discourse around race and equity has become increasingly fraught and polarized. Although the cultural and political conflicts around racial equity continue to dominate our media headlines, and the United States Supreme Court struck down affirmative action in a June 2023 decision, it is clear that work on racial+ equity has become increasingly common and widespread in the past several years.

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Conferences and publications that serve the philanthropic and nonprofit sectors now offer multiple opportunities for audiences to engage on equity-related themes and topics; a quick search turns up numerous groups offering tools and resources on racial+ equity for both funders and nonprofit organizations.

As more organizations aim to be more purposeful and action-oriented in centering racial+ equity, stories about how different organizations have engaged in this work can help remind people working towards social change of both the rich diversity of experiences organizations can have in pursuing equity-related goals and also illuminate a sense of collective purpose and movement around equity in a sector or field. One organization’s racial+ equity journey may look very different from another’s; some groups may be focused on equity in health and others on equity in education or the environment. Even though the impacts of these efforts may not yet be documented in concrete or measurable ways, stories are a powerful connecting force among these disparate efforts. Stories remind us that organizations like the RWJF, their funded partners involved in the ELL (and the thousands of other organizations that have embarked on similar journeys in the past few years) are connected by a central aim to strive for greater impact when addressing

⁴ The first phase launched in January of 2021, in which a self-selected cohort of grantee organizations were assigned coaches and began to engage with the tools and curriculum provided through the ELL. The second phase is scheduled to last through 2023 for organizations’ ELL work, and then midway into 2024 for more active engagement with the evaluation and field learning components of the project.

the persistent biases and inequities that exist in our systems and structures and in people’s hearts and minds. For organizations working towards health equity—where the research on racial and ethnic gaps in health and health care has been clear for decades—these stories demonstrate that health equity organizations can find ways to make progress. In addition, these stories may be useful for other organizations in the nonprofit and philanthropic sectors working to address persistent and systemic barriers to achieving greater equity.

What follows is an account of how the ELL came into being; the core values, beliefs, and assumptions that informed and guided the design of the ELL; and finally, the areas of focus for the learning and work conducted through the ELL. The ELL was a large project in both ambition and scale; many organizations undertook a deeper phase of their equity learning and capacity building simultaneously and, as a result, there are many insights and stories to capture and share. This piece functions as a type of connective tissue for the individual and collective journeys of organizations working to achieve more equitable health for everyone in the United States.

Genesis

In March of 2020, the COVID-19 pandemic shut down the world. The rhythms of daily life for Americans, whether they involved work, school, or leisure, were profoundly disrupted. And in May of 2020, George Floyd, a Black man, was murdered by police officers. The entire event was captured on camera by a courageous bystander and shared broadly across all forms of media.

Events involving violence against Black people had preceded the murder of George Floyd, and other events, tragically, followed. Black Lives Matter, as a movement, had sprung into being several years before May 2020. However, there was something about this particular tragedy — perhaps because it happened so publicly and during a period when the world felt upended — that proved particularly heartbreaking and galvanizing for leaders working across all sectors of our society.



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Around this time, program officers at RWJF began receiving a growing number of requests from their funded partners for support to embed racial equity in their organizational practices and culture. As a foundation, RWJF already had established practices of providing support in addition to the grants that organizations were already receiving; funded partners often received training or coaching from subject matter experts (“technical assistance”) and were sometimes given extra support for strategic communications planning or policymaker outreach. Meanwhile, the foundation was in the midst of its own efforts to ramp up their efforts on health equity; in 2014, RWJF developed its “Build a Culture of Health” vision: “to promote improved population health, well-being, and health equity across the nation.” During the



several years leading up to the conceptualization of the ELL, RWJF engaged in multiple efforts to assess and improve its own practices related to decision-making, resource allocation, program development, and grantee selection. At the same time, the Foundation recognized that while it was important to build and sustain its own internal capacity on racial+ equity work, it was also important to make investments in other organizations that were ready to build their own internal capacities for this multidimensional, deep, and often challenging work.

While RWJF's funded partners rated the equity-focused technical assistance that preceded the ELL as helpful, surveys also showed that these efforts were insufficient to meet the demand. These earlier efforts also failed to account for the different places from which organizations were starting this work — some were already well on their way to working more purposefully on equity, whereas others were just beginning.

The core concept behind the ELL was to design and implement a multiyear, multidimensional program for a cohort of interested funded partners. This new program would provide structure on a supported journey to accelerate the uptake of best practices, processes, and organizational policies that advance equity, diversity, and inclusion. In addition, the ELL was intended to support the organizations to aim high for results in terms of organizational culture and systems as well as programmatic strategies. Two intermediaries were selected to further develop and implement this program, [Learning for Action](#), which focuses on organizational capacity-building, learning, and evaluation, and [Public Equity Group](#), which specializes in strategy and business planning, with a racial+ and economic equity lens.

After a six month planning process, the ELL launched in January of 2021. Almost 40 organizations ended up participating in the ELL, with a total of 25 choosing to engage deeply with assigned coaches. (Other organizations joined group learning forums and engaged with the curriculum but did so through self-guided processes, without coaching.)

Values, Beliefs, and Assumptions

Work on racial+ equity, even when it happens within individual human beings, often feels complex and multidimensional. Organizations are comprised of individual human beings, each with their own sets of beliefs, values, and lived experiences. Encouraging individuals to work together on racial+ equity at an organizational level in order to make progress both internally (on things like organizational culture and policies) and externally (on work related to improving health and health care systems) can feel overwhelming at first. Where does this work begin? What role does leadership play in guiding the work? How can project facilitators manage and respect individual staff members' painful feelings and experiences, which are often excavated during racial+ equity work? How can facilitators avoid overburdening employees of color, who historically have been tasked with leading initiatives related to diversity, equity, and inclusion that are not in their job description?

With these and other considerations in mind, the teams at LFA and PEG — referred to as the “Hub” — felt it would be useful to articulate the underlying values, beliefs, and assumptions that went into the key design components of the ELL. These ideas came out of extensive research into existing models of organizational development and capacity building as well as research into how personal and organizational change happens, specifically in relation to equity work.

One of the most important elements to nail down at the outset was how to define the term “equity.” Equity, a word that conveys principles of fairness and justice, can have multiple levels of meaning — particularly when it comes to those groups experiencing inequities. And given that the ELL would be engaging in equity-centered work with different partners in different ways, coming up with a core definition of how the term equity would be understood and applied felt essential. As articulated during the design phase of the ELL, equity as a core value was defined accordingly:

Equity is both a means (what work, and how the work, is done to achieve health equity) and an end (elimination of disparities in outcomes based on identity-based traits). Engaging in deep equity work means “working toward outcomes in ways that model dignity, justice, and love without recreating harm in our structures, strategies, and working relationships.”

Source: Change Elemental

Ultimately, the LFA-PEG team decided to ground the work of the ELL in racial equity. The rationale for this was stated in one of the planning documents:

We lead with race because dismantling institutional and structural racism is essential to supporting the creation of a just and equitable society. Racism shapes the policies of our government and other institutions and unless otherwise countered will continue to result in inequities in health, education, income, and overall opportunities and outcomes. Even within other dimensions of identity — income, gender, sexuality, education, ability, age, citizenship, geography — racial inequities persist. Therefore, we believe it is essential for this work to center race while uplifting an intersectional approach to fighting all forms of institutionalized oppression.

In addition to equity, the ELL’s design was grounded in other core values:

- **JOURNEY OF LEARNING AND GROWTH.** We are all on our own racial equity journeys, learning, growing, and evolving at our own pace — individually, organizationally, and collectively. The ELL is an opportunity for us to learn together via capacity building that supports leaders and organizations to advance equity and racial justice.
- **COLLABORATION.** Given that we are all in learning mode, and that each of us is starting from our own place, none of us is “expert” or has all the answers. The ELL is an opportunity for multidirectional dialogue and collaborative work to embed equity both in what our organizations do and how we do it so that we can increase our capacity to make progress toward health equity.
- **CHOICE.** We recognize that funded partners are diverse across many dimensions, from organizational size, scale, and structure to where they might be (if at all) on a journey to embed equity, diversity, and inclusion in their organization. Thus, we are committed to creating multiple entry and engagement points for participants and we work closely alongside the coaches and funded partners to offer many different opportunities.

The table below summarizes this research and outlines the primary beliefs and assumptions that went into the design of the ELL:

Beliefs and Assumptions Underlying the Design of the ELL

Individual Change	Synergy	Organizational Development/ Culture, Strategy, or Evaluation
<ul style="list-style-type: none"> • Personal identity and experiences of systemic oppression, including racism, can significantly affect orientation toward and the change journey for people participating in racial+ organizational equity work. • There are multiple ways to spark contemplation of and motivation for change. • Values, assumptions, and beliefs drive behavior. • Assessment can help people prepare to change. • Change goes through phases but is not linear. 	<ul style="list-style-type: none"> • People and organizations must opt into racial+ equity work. • Racial+ organizational equity work is a journey without a single destination. • Racial+ organizational equity work is iterative and nonlinear. • Change journeys are deeply personal and emotional — not only cognitive — experiences that require deep work at the level of values and culture. • Peer models and social norms are powerful influencers. 	<ul style="list-style-type: none"> • A single individual cannot move an organization, but leadership is critical for achieving progress and meaningful change. • Organizations are more than an aggregation of individuals; they are also a structural set of systems, processes, and norms that reflect culture. • Start where there is openness (organizational development/ culture, strategy, or evaluation) and an accessible entry point. • Organizations need to embrace change in culture, vision, and communications to achieve meaningful progress on a racial+ equity journey.

All of these beliefs and assumptions informed the design and implementation of the ELL. In addition, LFA and PEG drew on theoretical frameworks and experiences developed by both their own organizations and others working in the spaces of racial+ equity and organizational development. For example, a framework called the Equity Continuum, developed by PEG, outlines a theoretical organizational journey towards greater equity that could potentially take place in different stages and at multiple dimensions of the organization's work, thus allowing for organizations to map their own equity journeys against this continuum.

The beliefs, assumptions, and theoretical frameworks that informed the design of the ELL rested on a fundamental insight: that work on racial+ equity will look very different from organization to organization, and that this work will often feel iterative, without clear end points. This insight runs up against many of the core norms, practices, and beliefs that undergird public and private sectors in the U.S., such as the focus on strategic planning and evaluation focused on setting clear goals and objectives and identifying metrics for an individual organization's impact or success. Initiatives like the ELL and others like it happening all over the country in the past few years (although perhaps none with as large a participant cohort as the ELL) may be an indication that the social sector has arrived at an important recognition that progress on racial+ equity will require multiple and ongoing efforts to see meaningful progress. As one of the beliefs and assumptions in the organizational change column states, "Organizations are more than an aggregation of individuals; they are also a structural set of systems, processes, and norms that reflect culture." In other words, the work of change has to take place at multiple levels — within individuals and organizations — with the intention that these changes will eventually take hold and transform systems and institutions in our society.

Key Design Components

As mentioned above, the choices and decisions that resulted in the ultimate design of the ELL reflected the beliefs and assumptions about the many different paths individuals and organizations can take to make progress on embedding racial+ equity in the work of an organization. Guided by those beliefs and assumptions, the ELL design featured components that are similar to other philanthropy-driven capacity-building initiatives and some that are unique to the work of organizational capacity building focused on racial+ equity.

FUNDING: Current funded partners in RWJF's Transforming Health and Health Care Systems portfolio were invited to indicate their interest in participating in the ELL. Any group interested in participating was allowed to join. Because funded partners received an array of services, such as customized coaching, that represented in-kind support above and beyond their existing RWJF grants. While this is a common practice at both RWJF and in the philanthropic sector, this decision consistently came up as a point of tension for funded partners in the initiative, with some participants noting that executive leaders may not prioritize the work of the ELL if they consider it unfunded.

COHORT-BASED: The cohort experience was a core part of the ELL's design, given the nature and complexity of organizational equity work. The underlying theory was that having access to a community of practice on a parallel track — each with its own unique twists, turns, freeways, and roadblocks on the journey — would add a mix of ideas, inspiration, encouragement, camaraderie, commiseration, joy, and celebration along the way, meeting both important practical and emotional purposes.

TIERS OF PARTICIPATION: The ELL has two tiers of participation: 1) self-guided and 2) intensive and coach-supported. At the start of the initiative, groups were given the choice to go at their own pace (Tier 1) or they could opt into receiving coaching (Tier 2). Ultimately, 25 groups chose to participate in the more intensive tier of the ELL, with a dozen opting into the self-guided tier.

Participating organizations engaged in the ELL with teams of 3–5 individuals, including at least one person in a formal leadership role with authority to make structural change within the organization. The expectation was that the organizational “unit” that participated in the ELL⁵ should have sufficient autonomy and authority to create meaningful change to the extent that equity, diversity, and inclusion is embedded in its strategy, programs, systems, structures, learning and evaluation function, and cultural norms and practices. The ELL teams that opted for the more intensive tier worked directly with a coach to strategize on how to make progress on equity-related goals, including when and how to engage the full staff team in conversations, trainings, reflection, all group learning forums provided by the ELL, etc., to ensure that the entire organizational unit was brought along in the process.

DESIGN ELEMENTS UNIQUE TO ORGANIZATIONAL EQUITY WORK: The ELL was designed to not only help organizations build their own capacity but also to model equitable principles and practices. For example, a bedrock principle of doing equity-focused work is recognizing that language matters — many phrases and words originate from structures and systems designed to perpetuate the erasure or marginalization of specific groups. Therefore, within the ELL, organizations commonly referred to as “grantees” in the philanthropic sector were called “funded partners.” Similarly, the ELL committed to an operating principle of ensuring participants get what they need (instead of everyone getting the same thing).

Organizations participating in the more intensive tier were provided with a Plan Coach to build deep relationships with participants and guide their journey at every step of the way based on who they are, what they prioritize, and what they need to make progress towards goals. LFA and PEG created two new tools: the Organizational Equity Reflection Tool and Equity Continuum Plan. Plan Coaches used these tools to help organizations assess the extent to which equity was already present in their work and organizational structures and practices and to help them set clear goals for embedding racial+ equity. Additionally, Content Coaches were engaged to, essentially, provide bespoke consulting engagements to funded partners when a specific, discrete need was identified.

In addition to these customized coaching engagements, all ELL participants received full access to a self-guided curriculum focused on learning about structural racism, health equity, and organizational change, as well as a collection of resources and tools, curated from an extensive scan of the many resources and tools in the social sector. Finally, funded partners were able to access consultants and experts who facilitated affinity groups within the ELL cohort, which enabled subgroups to discuss issues of particular interest. The wide variety of experiences in how organizational ELL teams engaged with these tools and additional resources will be the subject of another case study.

⁵ Some funded partners are standalone organizations while others are subsidiaries or departments within larger institutions, such as a university or think tank.

Areas of Focus

The ELL was designed to concentrate capacity-building efforts in the following three areas of focus:

EMBEDDING EQUITY IN ORGANIZATIONAL DEVELOPMENT (CULTURE, PRACTICE, AND POLICY): Within this area, organizations engaged in efforts spanning across function to probe deeper into the underlying power dynamics, norms, and values that permeate practices and internal operations. Organizations could focus on practices and policies related to leadership and governance; talent development and management; human resources; and organizational culture, norms, and values.

EMBEDDING EQUITY IN STRATEGY: Within this area, organizations could work on how to orient strategic planning or policy approaches for advancing health equity, either in the context of their own organization's work or in partnership with others. Organizations could examine their mission statements and/or their theories of change and action, and determine whether these statements or program strategies have sufficiently prioritized or centered racial equity, particularly at the systemic level. Organizations could also work on engagement and power-sharing with communities served by their organizations.

EMBEDDING EQUITY IN EVALUATION AND LEARNING: Within this area, organizations may engage in efforts to embed equity-related principles into their internal evaluation and learning efforts; expand internal learning questions, agendas, and analyses to more explicitly explore how to achieve more equitable outcomes; and integrate new assessment tools and approaches that are multiculturally valid and competent. Organizations could also promote understanding of the extent to which inequities exist and are being addressed; and/or develop metrics and indicators that promote understanding of the extent to which inequities exist and are being addressed.



To track with the areas of focus, and to help set parameters for the evaluation of the ELL, the desired outcomes within three years for the project are as follows:

OVERARCHING OUTCOME

ELL cohort organizations have accelerated progress on their equity journeys and thus are more effective in their work to transform health care systems that create more racially equitable health outcomes.

Embedding Equity in Strategy	Embedding Equity in Evaluation and Learning	Embedding Equity in Organizational Development
Organizational goals, intended impacts, program strategies, and resources are explicitly designed to advance racially equitable health outcomes.	Research, evaluation, and learning support internal organizational improvement, external strategies, and organizational accountability to racially equitable health outcomes.	Organizational leadership and governance, systems, policies, and processes— particularly those that govern access to power—are rooted in racial equity to advance a more equitable culture, more equitable internal practices, and a deeper equity focus of the organization’s mission work.

EQUITY LEARNING LAB

Next steps on learning and sharing, and a changed environment

This overview is intended to provide a foundational understanding of the ELL—its origins, design, and intended impacts. Other pieces in this series highlight organizations’ experiences in the ELL and themes such as the role of executive leadership in building organizational equity capacity or the challenge, shared by all funded partners, of where to begin the work and how to define meaningful progress. All case studies and other content are available at equitylearninglab.org.

